AASLH

# HISTORY NEWS

MAY/JUNE 1988

VOLUME 43/NUMBER 3

The official magazine for history and museums in the United States and Canada

Four Dollars

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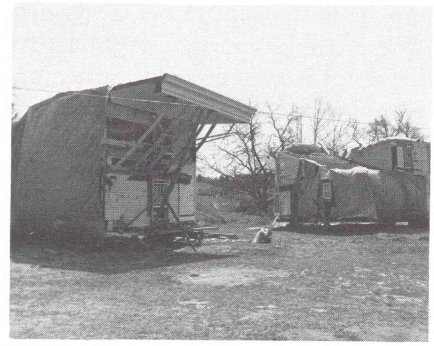

Above: *Cut apart for relocation from the site where it had stood for a century and a half, "Grassmere," near Franklin, Tennessee, gave way before an Arizona developer's plans. In his article beginning on page 26, Ronald L. Fleming points out that existing land use regulations are inadequate to protect the integrity of a historic landscapes. This photo by Mary B. Owen was provided courtesy of the Heritage Foundation of Franklin.*

Cover: *Another plantation house was not so fortunate. Shown here is the great hall of "Peach Blossom," built between 1800-1806 by Joseph Erwin, a man of wealth and influence in the Cumberland Country of Middle Tennessee.*

*In 1966 the Metropolitan Government of Nashville and Davidson County declined to purchase the property and the house was demolished. CRC Equities is planning to develop part of the land where "Peach Blossom" stood into high-density townhouses and condominiums.*



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# FROM THE DIRECTOR

## *Nomenclature and Other Names Great and Famous*

AS I HAVE visited historical societies and museums of all sizes, shapes, and forms over recent months, from Maine to Oregon, I have everywhere had a similar experience. As I have been toured from exhibit areas into the bowels of these institutions where books, and records, and historical objects are carefully and securely stored, I could not help but notice the mushroom-like emergence in some corner of a variety of devices almost always said to be the new aid and boon to all manner of record keeping, information retrieval, and data storage. Denominated in some way as *computer,* the proud recent acquisitor thereof then proceeds to describe in narrative form the wiles that were used to secure a copy of AASLH's long-out-of-print bible of object names, *Nomenclature for Museum Cataloging.* Tattered and torn though it may be, there rests beside the computer screen a copy of this rare and unusual book.

Given the extent to which historical society and museum collections folk hoard their copies of *Nomenclature,* you would assume that AASLH would have flooded the market with new printings of this odd classic. Not so. Quite the contrary. Over the past several years, the Association has worked with a talented and knowledgeable committee of professionals from the Margaret Woodbury Strong Museum and elsewhere to expand, revise, perfect, and everywhere improve *Nomenclature* so that it can continue to be the standard system that historical societies and museums use to give names to historical objects and collections. With the valiant guidance of James R. Blackaby of the Mercer Museum and Patricia Greeno of the Strong Museum and with strong support from the National Park Service, the National Museum of American History, and other entities large and small, *Revised Nomenclature* will pick up where its predecessor left off.

In that many historical societies and museums may already have made use of *Nomenclature*'s earlier edition in recording their objects and may even have a good deal of data already in computer storage, we will be trying to assist all hands in an orderly transition from one system to another. We will shortly be offering a Technical Report on switching from one system to its successor with ease and confidence. We will also be offering a subscription service to provide periodic update reports describing compatible software for use with *Revised Nomenclature* and future refinements in the system. After fielding endless questions on the whereabouts of *Nomenclature* and the whence of its worthy successor, I am happy to report that the revised edition is now available from AASLH.

✦ ✦ ✦

In my historical society perigrinations and inspections, I have found as well burgeoning reference libraries for a wide range of historical, genealogical, and technical research. On a Sunday afternoon at the Washington County Historical Society in Salem, Indiana, the well-stocked and extensive library collection teamed with wide-eyed researchers intent on charting their roots.

As well stocked as many historical society libraries may be, I have, however, observed a notable absence of the great documentary editions of America's presidents, statesmen and women, and of epochal developments from the colonial era to the present. Since the 1950s a growing number of dedicated documentary editors have labored over the papers of Washington, Adams, Jefferson, Jackson, Wilson, and Eisenhower. They have compiled and carefully transcribed records on the ratification of the Constitution, the first federal elections (1788), and the first federal Congress (1789). The same care has been applied to the records of Frederick Douglass, John C. Calhoun, and Mary Chesnut.

More than one hundred projects of similar scope and form have been encouraged and supported by the National Historical Publications and Records Commission and by the National Endowment for the Humanities and various host institutions. Nearly all have been lovingly designed and printed by university presses around the nation. But despite all the work and care and in spite of the monumental nature of the accomplishment, all too few of these volumes have found their way into historical research libraries and individual hands.

To assist in the marketing and distribution of these great volumes and to make it much easier for historical societies to acquire them, AASLH recently developed a new program called the AASLH Bookshelf of Great American Documents. With more than fifty projects from twenty separate publishers and featured in the new spring catalogue from AASLH Press, it is our goal to create a one-stop shopping place for America's documentary heritage. While the prices may sometimes seem steep, the great documentary editions are gold mines of carefully sifted and presented historical data. We invite historical societies to begin investing in the purchase of these valuable works. ✦

# LETTERS

## *Universal jubilation*

I want to commend the staff on the March-April issue of HISTORY NEWS. The layout and design for my article ("To Preserve the Human Record") was very attractive. I particularly like the illustrations and the highlighting of quotations.

Larry Tise's special report,"Organizing America's History Business: A New Ethic and Plan of Action" was excellent. Certainly he has captured the essence of the problem that history educators face. This article will stimulate enthusiasm and excitement among historians. I hope the National Archives will be able to collaborate with historical organizations and cultural institutions to enhance the interest in history of the general public.

DON W. WILSON
Archivist of the United States
Washington, D.C.

Congratulations to Larry Tise, Candace Floyd, Gill Murrey, and the other staff involved on an excellent "new look" for the Association. The design changes in HISTORY NEWS and HISTORY NEWS DISPATCH are first rate, giving them a more concrete and credible feeling. AASLH is now projecting a high-quality, no-nonsense image.

I also like the new logo very much. Its strong link to the old tree logo projects continuity. At the same time, it is a striking, fresh image that is consistent with the new feeling of HISTORY NEWS and HISTORY NEWS DISPATCH.

DAVID A. DONATH
Director
Billings Farm and Museum
Woodstock, Vermont

Oh happy day! Larry Tise's "From the Director" column ("Taking Local History to All the Realms of the Kingdom," January-February, 1988, HISTORY NEWS) is of particular interest to our site, as we have both an out-of-print book in public demand and a couple of books in need of a distribution boost. I look forward to more information about the AASLH Library Program. Tise's tale of historical ferreting and publishing brought back memories!

KATHY FISHER
Executive Director
Furnace Town
Snow Hill, Maryland

## *Well,* almost *universal*

It has dawned on me that HISTORY NEWS has changed. Allow me to register my dismay at the denser, less communicative style you've adopted. The magazine used to be such fun to read. What happened? Can only "scholarly" approaches be taken seriously? What's wrong with "how-to?"

J. WINER
Boston, Massachusetts

## *DISPATCH readers thanked*

The response to my request in HISTORY NEWS DISPATCH for a copy of Robert Chenall's *Museum Cataloguing in the Computer Age* was astounding! Seven people from various institutions all over the country answered. Even a staff member from our own Milwaukee County Zoo replied, as well as an archivist from the Arizona Historical Society, to mention just a few.

A copy of the book is on its way to me. I am grateful to all of you who responded.

ANN DUGGAN
Curator
St. John's Military Academy
Delafield, Wisconsin

# HISTORIC PRESERVATION: NEW THREATS, NEW STRATEGIES

## The assistant director of the National Park Service calls for a partnership for preservation

*By Jerry L. Rogers*

FOR A QUARTER of a century after World War II, the United States experienced development on a scale beyond precedent. Federal government action, through the war itself, had produced an enormous concentration of economic power, so it was natural for the government thereafter to direct that power to peaceful uses. Federal support motivated and sustained river and harbor improvement, reservoirs, an interstate highway network, the renewal of cities, modification of farmlands, and many other activities. These works were premised upon an unquestioning public confidence that development meant progress, and that rapid development meant that things were well managed.

Along with the intended good results, these federally sponsored projects were producing extensive and unnecessary harm. The first brave souls who pointed out that haste was laying waste to historic buildings and neighborhoods, archaeological sites, public parks, and wildlife habitats were attacked as short-sighted obstructionists. By the mid-1960s, however, it was clear that the shortsightedness was on the other side.

Because the federal government was creating the problems, it was logical to contemplate federal solutions. For fourteen years, beginning with the National Historic Preservation Act in 1966, Congress enacted law after law that recognized historic resources, placed limited planning and review requirements upon federal agencies, and enlisted citizens in the process of identifying and protecting their heritage. The citizen-oriented administrative approaches of the National Park Service, the State Historic Preservation Offices, and the National Trust for Historic Preservation helped swell a small cadre of embattled defenders into a popular cause with strong support among a majority of citizens.

Just as these defenses were completed, they were flanked by other forces that may prove even more powerful and extensive than the old federal threat. Although the birth rate in the United States today is at an all-time low, and will, if sustained, eventually result in zero population growth, this situation will not be reached until the year 2050, and by then the population will be three hundred and nine million. Not only will population growth require more work places, living spaces, and the facilities that go with them, broader options for how people work and where they live will invite more of such development per capita. With computer terminals, more people than ever before can earn their livelihood at home instead of in offices. More people than ever before have jobs that keep them on airplanes on a daily basis, and thus, they do not need to live near where they work. Among workers who do commute daily between home and job, many belong to families having two incomes. That, together with the temporary return of cheap fuel, enables them to live far beyond what used to be called suburbia. Weekend hideaways or second homes are no longer privileges of the wealthy, but modest luxuries that many middle-income Americans enjoy.

Although many of these changes are presumed to be good, one negative result is that development pressures are far more extensive than expected, and they may continue to be so for the next sixty years. These pressures are affected only slightly, if at all, by the other federal laws that protect historic and other resources.

Beyond the reach of federal law today, treasure hunters "salvage" shipwrecks hundreds of years old with little or no

regard for archaeological values. Developers in South Carolina recently began to subdivide the National Historic Landmark estate of Charles Pinckney, one of the most important figures in the writing and ratifying of the Constitution. Preservationists are rallying to raise two million dollars to buy and save the property, twice the price it would have brought before a recent zoning decision. Atlanta citizens who care about their city's past are seeking contributions to rescue Margaret Mitchell's home from developers.

Further north, the National Historic Landmark village of Waterford, Virginia, is threatened by suburban development almost fifty miles from Washington, D.C., which has generated explosive growth over northern Virginia. Loudon County officials, citizens, and even the developer are engaged in arduous efforts to protect Waterford, even though the National Park Service's only threat is to withdraw the landmark designation. In adjacent Prince William County, National Park Service Director William Penn Mott, Jr. pleaded with elected officials to review staff-level decisions that will allow a major shopping mall on historic land across the road from Manassas National Battlefield Park. Mott urged the county to recognize that the National Park unit is both a local asset and a national treasure. At the same time, Mott acknowledged that the federal government has no direction over local land use decisions. The chairman of the county board responded that if the National Park Service cared about the land, it should have bought it.

All over the nation, the threats to historic, scenic, recreational, and natural resources are accumulating. Even mighty Yellowstone, the world's first natural park and an early entry on the World Heritage List, enjoys no exemption; adverse use on private land at its northwest corner puts it in peril.

If we try to meet such threats one by one, we will soon see the vistas and green fields of our countryside obliterated for more concrete, glass, and steel and the loon, the buckeye, and the wild sumac driven away. The survival of locally significant resources requires Federal strength and action. But the preservation of historical resources that possess nationally significant value also requires bold, ingenious, and energetic commitment from local communities.

Coping with development pressure is only one aspect of preserving historic, natural, scenic, and recreational resources. Consider the scope of the historic resource problem. The National Register of Historic Places now includes about 50,000 entries. Many are districts, so the total number of buildings, structures, sites, and objects is much greater. In response to a request from Congress,

*Line illustrations reprinted from "Our Vanishing Heritage and what to do about it" published by the Boston Society of Architects, 320 Newbury Street, Boston, Massachusetts.*

the State Historic Preservation Offices have identified a need amongst these properties for about $2.7 billion over a ten-year period.

On National Park lands alone, there are 15,000 buildings and structures that appear to meet National Register criteria. The Park Service has already decided to preserve 7,500 of them and will certainly decide to save many more. The agency has almost 26 million objects in its collections, most of which have yet to be catalogued. The number of archaeological and ethnographic sites is so large that it cannot be reliably estimated. Just to learn enough about the cultural resources that it already holds, so that these can be properly managed, and then to carry out the needed management actions, the Park Service would have to spend about $25 million more every year than it now devotes to this purpose.

The need is critical for know-how, for reliable technical information, and training in how to identify, evaluate, register, plan for, document, and preserve resources. Sharing this need are architects, archaeologists, conservators, curators, engineers, ethnographers, historians, planners, and all others who do the work of historic preservation. This is true whether they work in units of the National Park Service, laboratories, universities, State Historic Preservation Offices, Certified Local Governments, nonprofit institutions, private concerns, or elsewhere. The National Park Service could begin to meet this need with about eight select employees and $1.7 million a year. With additional funds beyond that, it could create a coordinated network of federal agencies, universities, and research institutions, modeled on the Cooperative Park Study Units that exist on many campuses, to develop, extract, and share the needed information.

The scope of these tasks might dazzle the faint-of-heart, so a few words of perspective may be useful. The total number of buildings in the National Register is only a tiny percentage of all the buildings in the United States over fifty years of age. The needs that State Historic Preservation Officers have identified for those buildings is, therefore, only a small fraction of what we spend on buildings of all sorts, and is equivalent to the cost of only a few shopping malls like the one proposed near Manassas. The total number of historic buildings in the National Park system amounts to less than one per five thousand acres, even though historic parks are often small and have concentrations of buildings.

Preservationists are adept at getting maximum results from a small amount of money. With $2.7 million appropriated for the purpose this year, the National Park Service expects to catalog almost five million museum objects. Since 1983, the agency has used a new authority to lease unneeded historic properties to draw over $14 million of private investment into those properties. During the past ten years, the Park Service and the states have approved 19,000 historic building rehabilitations under federal income tax incentives that involved over $12 billion in private investment. Congress has encouraged the use of limited grants to do only the architectural and engineering work on a project as a means of securing the maximum preservation result with a minimum investment of public funds. Although federal historic preservation grants have averaged only $23 million a year, *Time,* in its edition of November 23, 1987, credited the resulting historic preservation movement with achieving the basic objectives of the heavily funded urban renewal programs of old.

For an international perspective, in 1976, the Republic of the Ukraine, an area of the Soviet Union slightly smaller than Texas, had a register of historic places of about 45,000 properties, including 2,500 possessing the highest order of significance. All 45,000 have documentation equivalent to a National Register nomination in the United States, plus measured drawings or photographs similar to those done by the Historic American Buildings Survey (HABS) and the Historic American Engineering Record (HAER). Over 10,000 have been subjected to materials analysis so that restorers could precisely duplicate wood, mortar, plaster, paint and other materials. In comparison, the National Register for the entire United States today includes only 50,000 entries, of which only 1,800 are designated as nationally significant. HABS and HAER have documented only about 23,000 buildings and structures. Materials analysis in the United States occurs only as a step in an actual restoration project, and sometimes not even then. The difference is one of public priority for historic preservation. One must wonder why.

If our mission is reasonable, albeit enormous, what is needed to make it achievable? First, additional protections need to be devised for properties of national significance, whether they are in the National Park system, on other public lands, or privately owned. This must be done without diminution of concern for historic properties of local significance that may be as important within their local contexts. And it must be done while respecting the principle of federalism that reserves land use and development decisions to local authority.

The needed protections can be accomplished through a stronger partnership among government at all levels and the private sector. Coordinating its work with park general management plans, this partnership could become an instrument for National Park protection, while at the same time defending the full spectrum of historic properties in local areas. By developing state historic preservation planning into an effective element of local planning, this partnership would demonstrate how public and private interests, working together, can protect natural areas, recreational resources, and scenic beauty.

Governmental agencies that support heritage work must maintain a diversity of direct and indirect funding approaches and use these approaches in ways that win the

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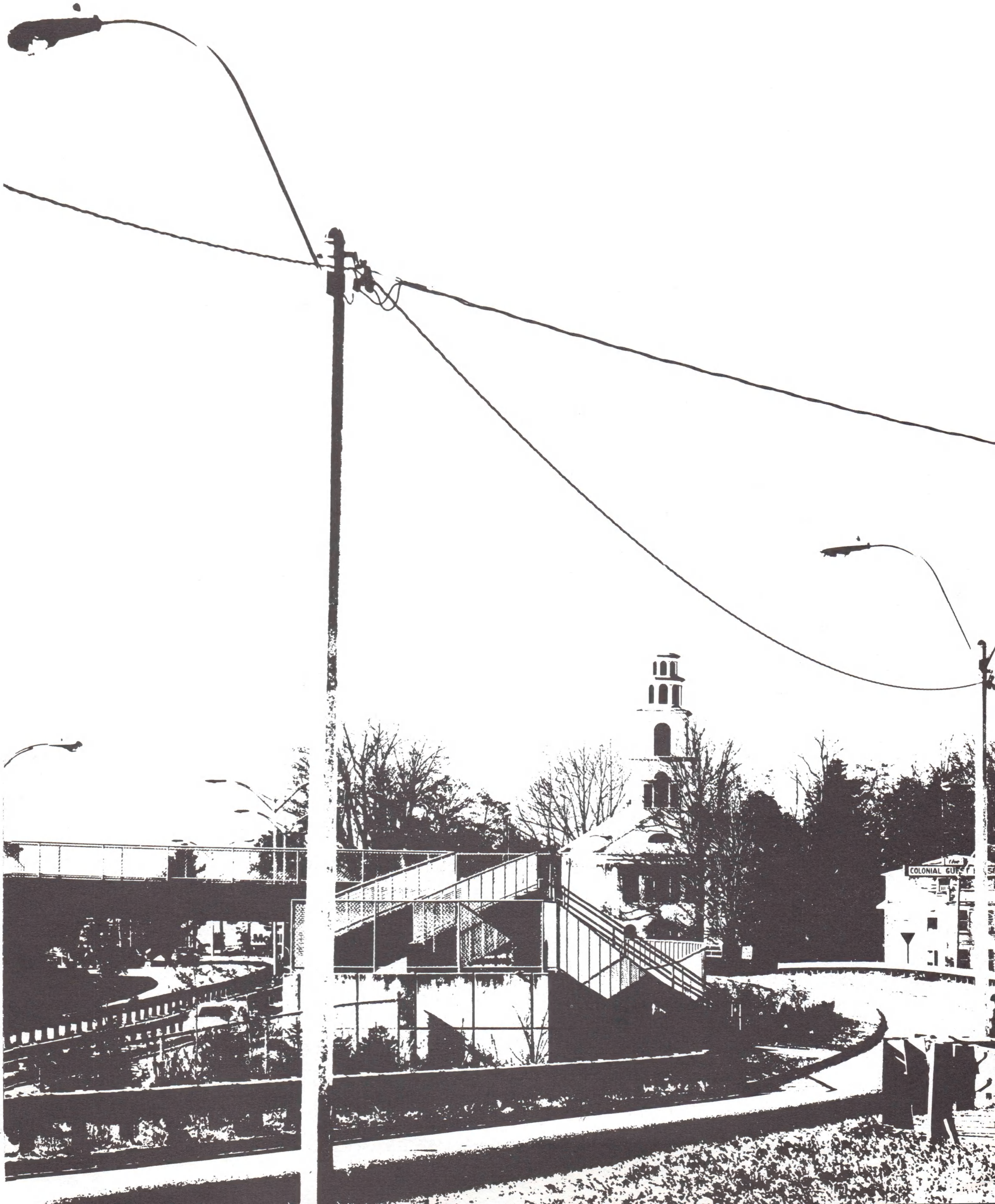
*of National Register properties*
*are equivalent to the costs of only*
*a few shopping malls.*



*"The chairman of the county board responded that if the National Park Service cared about the land, it should have bought it."*

maximum participation of the private sector in historic preservation. Each program should function as a coordinated and accountable federal / state / local / private interaction. No level of government should be permitted to focus exclusively upon its own interests. Locally significant properties must not be bargained away for the benefit of nationally significant ones, but the entire apparatus must welcome the duty of protecting nationally signficant properties—even the National Park system itself. A major federal objective should be to strengthen state programs and promote their ability to resolve problems. Similarly, states should strengthen and promote local programs. The standards, guidelines, technical information, and training that the National Park Service produces should be usable for park operations but also by other federal agencies, states, local governments, historical societies, museums, and others.

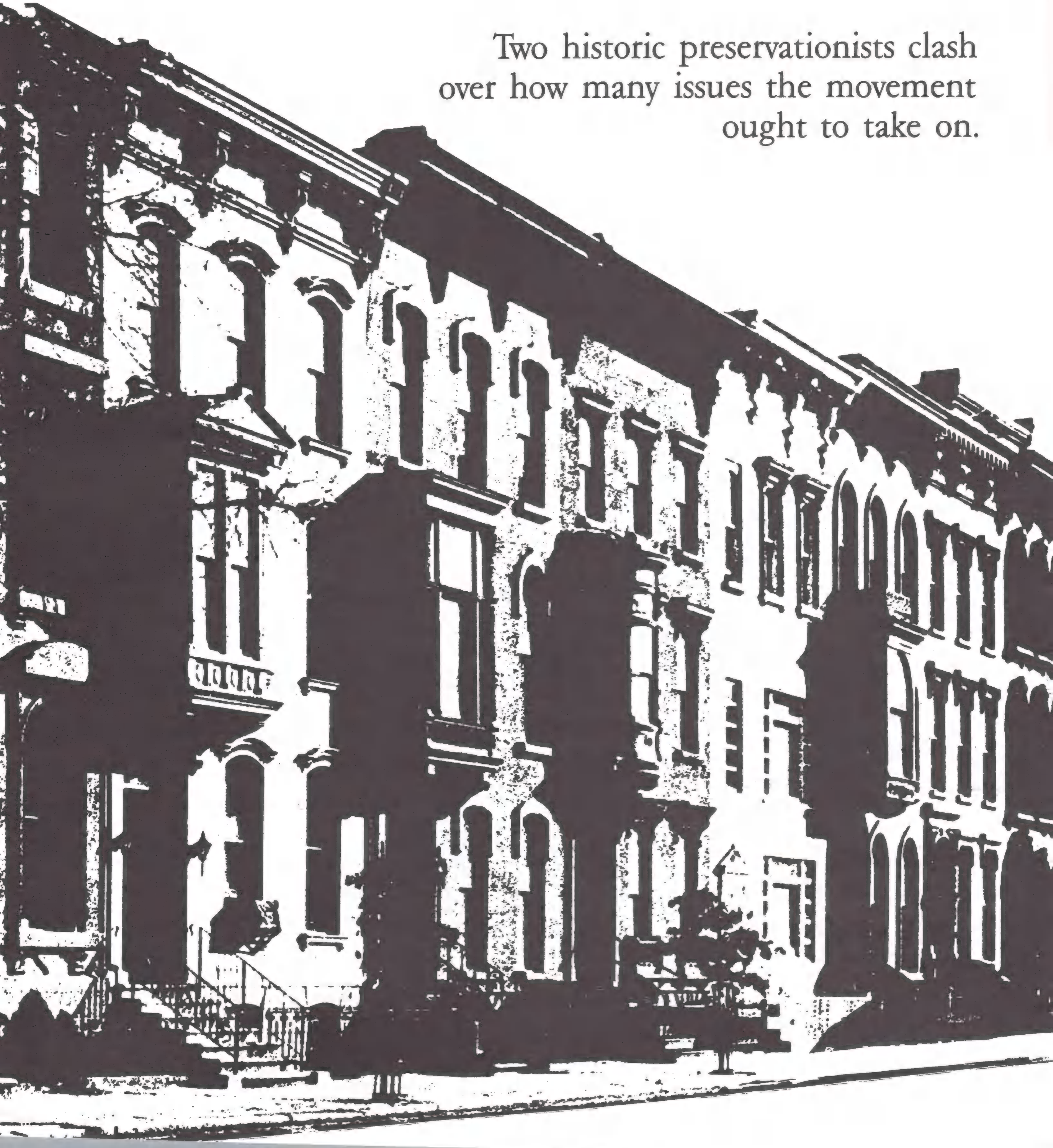
Historic preservation can be made a public priority, and 1988 is a year when citizens have far greater influence than usual in declaring what priorities should be. Most governors, mayors, and state and local officials will stand for election, as will every member of the U.S. House of Representatives and one-third of the members of the U.S. Senate. The President elected this year will soon afterward appoint cabinet officers, bureau chiefs, and many others. Quickly, the agenda will be set for at least the next four years. Between now and then, preservationists will be promoting their cause with all candidates, seeking support but remaining bipartisan. Person for person, preservationists will find greater success than most other citizens. They have to, and they always do. ✦

*Jerry L. Rogers is associate director for cultural resources at the National Park Service.*

*Photo courtesy of The Heritage Foundation / Anne B. Owen.*

# WIDE GAUGE OR NARROW?

Two historic preservationists clash over how many issues the movement ought to take on.



# *We Must Embrace More!*

*By Loretta Neumann*

SEVERAL YEARS AGO, I remember hearing the somewhat tongue-in-cheek plea of a rather disheartened state historic preservation officer who said we need to put the word "history" back into historic preservation. That was Larry Tise, now director of the American Association for State and Local History. My hunch is that, if asked about the state of historic preservation today, he would reply that not much has changed, and in some ways things have gotten worse. Indeed, given the design-oriented emphasis of the movement today, he might ask us to put back the word "preservation" as well.

For me, a personal case in the semantical war was the battle over Rhodes Tavern in Washington, D.C., a two-story eighteenth century relic—the last of its kind in that part of Washington and the only one of its kind considering the events that occurred there. Yet, Rhodes Tavern was lost to the wrecking ball because those who were initially involved in the matter were more concerned about preserving the visual grandeur of the area. They started with little understanding of the significance of the tavern and did not anticipate the uproar that its demolition would cause.

It was not until after the negotiations were over (which ended, I might add, in the preservation of the facades of several lovely nineteenth century Beaux Arts buildings), that the historical value of Rhodes Tavern was brought into question. By then it was too late. Many people had invested too much of their money or reputations in the decision. Preservationists themselves were pitted against each other. Questions of significance turned on the "fabric" of what was left of the building. Was saving these remnants—albeit fixed up and "prettified" for future use—enough to justify the loss of time and money involved? Would it be "real" preservation or just reconstruction? Were there other battles that were more important to wage and more likely to be won?

In the end—and I was there to mourn it as it fell into rubble—the Rhodes Tavern was lost, not because it lacked something historical but because it lacked something visual. Ironically, most of the other preservation battles in Washington are quite different. "History" is often used *against* preservation. The issues become architectural ones, the jargon that of urban planning. Things historical revert to being defined in terms of famous people or important events. Developers argue, "Yes, it's very charming, but it doesn't need to be saved because it isn't 'historic.'"

A recent example of this attitude involved the thirteen story commercial Woodward Building, in the heart of Washington's historic financial district. In this case, neither history nor design was the central issue, although both were argued mightily. Rather, the developer simply wanted underground parking! To get it, his architects argued that a new building, modeled after the old with some embellishments, would be vastly superior. They even hinted that the new one would look more "historical" than the old, since the materials would be of better quality and more in keeping with its neighbors.

In the end, the city approved the project on the basis of "social" benefits—the developer offered to include housing units and a day care center. At no time was he interested in renovating the existing building to provide these amenities. The words of preservation are meaningless to people whose goals are so different.

Preservationists themselves are often unwilling to fight for all of the things that come under the preservation rubric, for example, archaeology. As a term of art and law, "historic preservation" includes both prehistoric and historic resources. Archaeological sites, by their nature, usually involve land management decisions, not just artifact collections.

Many preservationists do not understand that, in archaeological terms, mitigation is not synonymous with preservation. Digging means destroying, regardless of how carefully done or how sophisticated the analysis or interpretation. Yet some "preservationists" are unwilling to designate as "historic" those resources that cannot be seen and whose value cannot, therefore, be measured.

Indeed, preservationists dismiss as arcane or irrelevant whole worlds of things that are, and should be, part of historic preservation. Wilderness areas are a foremost example. When Congress designates certain federal lands as wilderness, this protected area does not merely save a landform or a wildlife habitat or a watershed. It also holds the history of a cultural experience. Wilderness offers a view of an essentially unaltered world that our ancestors saw but that, if not preserved, future generations will never know.

"Preservationists dismiss as arcane or irrelevant whole worlds of things that should be part of historic preservation."

I recently said much the same to a very active young preservationist who looked at me sharply and replied that she didn't have time for all those things. "I'm only interested in saving the city I live in," she explained. Yet we cannot hope to preserve the physical fabric of our cities if we do not save the air, the land, and the water on which they and all of life depend.

This attitude is, not unexpectedly, reflected in the goals and activities of our national preservation organizations and institutions, some of which seem more interested in protecting their professional turf or financial resources. Mountains of paper are produced in chasing increasingly scarce federal dollars.

While funds are desperately needed, the time involved in getting them often results in the neglect of other preservation concerns. The current big push is for amendments to the tax code that will improve the tax credits for restoring revenue-producing buildings. Yet, as preservationists, we should also concern ourselves about the Clean Air Act amendments to protect historic resources from acid rain, and about the Abandoned Shipwrecks Act to protect submerged resources, and about the Olmsted Heritage Landscape Act to protect historic landscapes.

The vocabulary of historic preservation must begin to embrace more—but not necessarily all—of the issues that relate to it. We cannot close our eyes to the world around us. Thoreau said it well: "A village is preserved not more by the people in it than by the swamps and woods that surround it." As we have discovered, we cannot preserve the understanding of the Civil War battles at Manassas by just protecting the core battleground. The surrounding farms—now threatened with shopping malls and other modern developments—are also important.

One reason why preservationists often cannot see the larger picture is that this is still an emerging field. People come to preservation with many motives and different points of view. There are architects interested mainly in restoring buildings, civic activists involved in saving their communities, and archaeologists concerned about recording the remains of our undocumented past. Also involved are historians, researching and evaluating historic structures and events; landscape architects restoring original plantings and historic settings; underwater archaeologists exploring old shipwrecks; museum curators conserving fragile artifacts; and park rangers interpreting sites to visitors. However, a huge part of the preservation community—undoubtedly the largest part—comprises people who simply want to help save some of the things they care about. There is a powerful human need for a sense of place, for a feeling of the continuity of life in the midst of change.

The recognition of this growing diversity has resulted in one of the most heartening changes in the preservation movement, namely the coming together, in a variety of ways, of the preservation and environmental communities.

Largely as a result of efforts by the National Trust for Historic Preservation and the National Conference of State Historic Preservation Officers, an *ad hoc* "Preservation Forum" has commenced work. It proposes to bring together a number of national preservation groups, including the National Trust and the National Conference, but also the Society for American Archaeology and other preservation groups, as well as representatives from the National Park Service and the Advisory Council on Historic Preservation. For over a year, participants in the forum have met periodically to try to develop a consensus on the future of preservation in the United States, including possible new legislation.

Other efforts are going forward. A number of preservationists have established the Coalition for Applied Preservation Technology to focus on developing a center to serve a wide variety of preservation needs. A new "Heritage Coalition" includes groups interested in park and conservation issues, as well as historic preservation. Several preservationists have also become involved in the "Blueprint for the Environment" project, to assure that historic preservation issues are among those included by the environmental community for presentation to the next administration.

The future looks promising, but it won't happen if we don't take off our blinders and see the rest of the world. What we have is a desire to "preserve" something "historic," in whatever meaning those words convey. And if we don't always do it perfectly, it is still worth trying. ✦

*Loretta Neumann is vice president for conservation, environment, and historic preservation of Foresight Science and Technology, Inc., in Washington, D.C.*

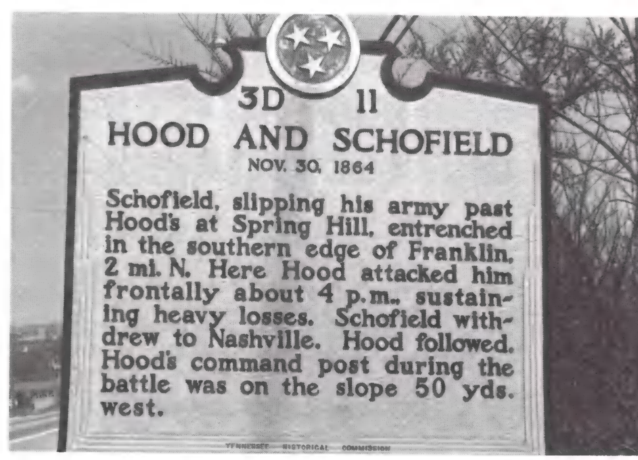
# *The Challenge Today: To Introduce Constraints*

*By Dan L. Morrill*

*Because historic preservation is dominated by neighborhood activists, argues Dan Morrill, rural properties are often neglected. This field where thousands lost their lives in the Battle of Franklin is threatened with "light industrial development."* The Heritage Foundation / Anne B. Owen

I CAN REMEMBER riding across eastern North Carolina as a youth in the 1940s, through such places as Dunn, Erwin, Clinton, and even Turkey, on my way to the shores of Bogue Sound. There, I felt the humid salt air blow over the "goodliest land" in the world, our beloved North Carolina.

It is my profound commitment to the preservation of our state's physical heritage that compelled me recently to testify before a study commission of our legislature against what I regard as a misuse or misapplication of North Carolina's historic preservation laws. The essential point I made to the lawmakers was this: that whereas, in the 1960s, after the passage of the seminal National Historic Preservation Act that created the National Register of Historic Places, the need was to expand and broaden definitions, the challenge today is to introduce requisite constraints.




Evidence abounds that the essential purposes of historic preservation—to identify, safeguard, and interpret those elements of the built or man-made environment which possess enduring historic value—are in danger of becoming overshadowed by an array of ambitions, however noble or worthwhile, which are not directly tied to history. Not a few individuals, for example, want to use historic preservation *primarily* as a means to introduce or expand sophisticated land use planning tools. Others see it *primarily* as a way to make their places more attractive or to boost tourism. Still others turn to historic preservation *primarily* as a way to refurbish older neighborhoods or to revitalize central business districts without focusing much attention upon the relative historic importance of the target areas.

"What's the problem?" somebody might ask. "Why not use history primarily for this or that if it makes good things happen?" I contend that misusing historic preservation is a bad practice for several reasons.

First, and perhaps most importantly, doing so is fundamentally deceptive. The vast majority of the people of North Carolina honor and respect the traditions and history of this state. That is why, despite their basic conservatism, the people support the vigorous regulations in our historic preservation local enabling legislation. I do not think, however, that they want such powers as delays of demolition, deferral of property taxes, design review guidelines, and eminent domain to be applied liberally to embrace a broad spectrum of supposed historic resources.

Using historic preservation to further ends that are not directly tied to history can produce distortions and falsifications of the past. Because historic preservation is becoming increasingly political, especially at the local government level where it is frequently dominated by neighborhood activists, important cultural resources, such as archaeological sites or remote rural properties, are sometimes ignored or overlooked. Consequently, historic preservationists can produce an incomplete or inaccurate image of the past, full of lovely decorations or exquisite front facades, but often lacking genuine historical meaning or devoid of interpretive schemes that allow people to respect and comprehend the real past, beautiful and ugly, heroic and painful. Even more disturbing to me are instances when the enthusiasm to save a particular building prompts one to scurry about, hoping to uncover a juicy historical fact that will justify giving the endangered property official historic status and, thereby, encourage its preservation. The dangerous implications of such a practice are all too obvious. It might be termed "cultural Russian roulette."

Third, and finally, I believe that a broad and expansive application of historic preservation laws will undermine the long-term credibility of the movement. Unlike the natural environment, where one is dealing mostly with finite resources, such as water, soil, and air, history is a constantly expanding resource. Our civilization could last for thousands of years, and each generation will leave its mark upon the landscape. What if each generation is as active in identifying local historic districts as this one has been? In Raleigh, for example, there are five historic districts, many of them having been built in the early years of this century and all designated as "historic" within the last twenty years. Will there be ten historic districts in Raleigh by the year 2025? Fifteen by 2075? Twenty by 2100? Or will the preservationists of the twenty-first century eliminate our historic districts so they will have room to declare neighborhoods of the early 2000s *their* historic districts? Are we not being presumptuous to expect our children's grandchildren to judiciously apply design review guidelines over five historic districts that this generation has created in Raleigh, or however many in Greensboro, or Winston-Salem, or Asheville, or Wilson, or Wilmington, or Charlotte, or wherever? In my opinion, the folly of this situation will one day become obvious to the great majority of the people of North Carolina. Indeed, in the major urban centers of the state, that day is fast approaching.

In my testimony to the study commission, I urged the legislature to take several actions that would alleviate this situation:

- develop mechanisms that will separate and distinguish historic preservation from such ends as neighborhood conservation, aesthetic enhancements of the built environment, saving distinctive landscapes, humanistic urban design, preserving pleasant old buildings, and boosting tourism.
- provide training in historic research methodologies for the staffs and members of historic properties commissions and historic district commissions so that these local agencies can assess the historic significance of cultural resources in their communities
- increase the power of the North Carolina Division of Archives and History to guide and influence the designation programs of these commissions and require them to demonstrate full and faithful consideration of public comments regarding prospective designations
- create a gradation system for historic resources, which would rank them from absolutely irreplaceable to somewhat important and provide appropriate controls and safeguards for each level of significance
- retain comprehensiveness in design review standards for historic districts and historic properties to assure that such designations protect resources of demonstrated and enduring historic importance
- give historic district commissions the power to acquire the fee simple or any lesser included interest in contributing properties within historic districts
- permit local governing boards to use the power of eminent domain to acquire such properties when a certificate of appropriateness for demolition of same has been issued
- provide for a stay of demolition for prospective historic properties or historic districts so that a disgruntled owner, upon learning that historic designation might be forthcoming, will not be able to eliminate his "problem" by destroying the property
- consider what obligations, if any, an owner has to safeguard a historic property for which he has obtained a deferral of fifty percent of the ad valorem or local property tax.

Our citizens want our historic preservation laws to be used for historic preservation. Nothing more. Nothing less. I urge those who seek other ends, however closely related and worthwhile they might be, to sail under their true colors and not to call themselves historic preservationists. ✦

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*Dan L. Morrill is consulting director of the Charlotte-Mecklenburg Historic Properties Commission in Charlotte, North Carolina.*

# A MADE-FOR-TELEVISION HISTORIC HOUSE SERIES:

## From Opera to Sitcom

*By Mary Ellen Conaway*

## The Setting

Most of us act on the belief that the positions of curator and museum director imply a set of particular attitudes and approaches. We care for objects, we preserve things for posterity, we show how artifacts serve as cultural and historical markers. We give and receive training and call ourselves professionals.

Few of us are prepared for this philosophy to be openly and successfully challenged. Even as it happens, the challenge and its aftermath evoke betrayal of values, goals, and purposes we have embraced and to which we have dedicated our careers, in some cases, our lives.

This philosophical challenge from those who reject our values opens for consideration, once again, the role of culture, history, art, and museums in our nation's towns and cities and schools. It requires us to address how we can pragmatically prepare ourselves, and those we teach and encourage to enter the museum field, when in the course of political events, our professionally inspired attitudes and approaches clash with utilitarian attitudes toward the historical resources we manage.

## Scene One: our city acquires a historic house

Ninety-four years ago Melvin Baldwin (my stage name for him) moved into his new home and established himself as an unselfish and cooperative citizen in a growing frontier community. Baldwin, a Swedish immigrant, commissioned a well-known architect to construct a Queen Anne house for him and his wife, Sallie Beacher Baldwin. Situated on more than six hundred acres of agricultural and ranching land, the Baldwin House has always radiated a sense of substance and elegance. Once in the country, far from the main street of town, the house now serves as an anchor amidst residential, recreational, commercial, and industrial features characteristic of a city of 135,000 people.

The Baldwin House, one of only three of its vintage restored for public access in the region, has always attracted attention. New residents in town, the many seasonal visitors, and those who have seen the house for the first time often want to buy it or express an affinity for it, remembering "grandmother's" house. Their fascination arises from the two full stories and attic tower that stand sentinel over the town's essentially flat terrain and unimposing single story structures.

Through their involvement in diverse civic activities, the Baldwin's actually established the house as an integral part of the community. They were generous participants in affairs of the early town, from economic activities to church, school, fraternal, sororal, and historical events. Baldwin at various times was a banker, legislator, farmer, and rancher. He helped found an Independent Order of Odd Fellows lodge and started an old settlers' association, which held its first picnic on the Baldwin property.

Mrs. Baldwin's nephew and his wife, the Reverend Paul and Mary Belle Smarter (again, my stage names) assumed responsibility for the house in the 1920's since the Baldwins had no children. As active members of the religious life in the community, the Smarters continued to use the house for public events. They added a study, a California bungalow concrete porch, and a second bathroom.

Following the wishes expressed in Sallie Baldwin's will, the house served as a home and meeting place for the Odd Fellows for a few years. The property was then deeded to the city with the stipulation that it keep and maintain the "'dwelling house and grounds in good condition. . .to be used for such lawful, charitable, and public purposes in an historic context as to secure the perpetual maintenance and care of the premises. . . ." In 1979 the Baldwin House was entered on the National Register of Historic Places.

Once the structure became public property, calls for its restoration, preservation, and use were heard. To stabilize the structure and make essential repairs, the historical society brought together resources from the state historic preservation office.

## Scene Two: restoration and community support

In July 1984, the city legally assumed full administrative and budgetary control of the property. From public money, there was committed $85,000 in capital improvements between 1985 and 1987 and another $57,000 between 1987 and 1989. The first appropriation fully addressed the grounds, house exterior, attic insulation, plumbing, and more. Corporations, businesses, service clubs, families, and individuals also contributed. They gave cash, goods, and services, including a ramp for handicapped visitors, a sprinkler and drip watering system, and shrubs and trees for planting on the grounds.

A firm specializing in historic property preservation was hired to produce a condition report and maintenance manual. These served as valuable guides for restoration and care. Finally, the museum's advisory board and the city council approved a use policy and fee schedule.

## Scene Three: use of the house

Once the Baldwin House was restored, its preservation depended upon its use. Three kinds of activities predominated: (1) rental to the groups and on the terms specified in the use policy; (2) daily tours by trained volunteers and staff; and (3) programs. The use policy developed from a series of museum board and city council meetings. The goal—to establish a balance between preservation and community access—resulted in low use fees with restrictions upon activities in and around the house.

The use guidelines approved in 1985 by formal vote and

full agreement of both the museum board and the city council read as follows:

"The Baldwin House is operated for the edification and education of the general public. Permission for private use of the house and fenced-in grounds is a privilege granted through an application, review, and approval process, and subject to reasonable fees and requirements as befits so precious a historic resource. All users agree to follow the established policy and attendant conditions.

"The following activities constitute an appropriate use of the facility: educational functions, tours, lectures, seminars, workshops, musical recitals, weddings, receptions, civic nonprofit organization business meetings and luncheons, and similar activities as approved. All events must involve city residents. Private parties reserving the house must be city residents and must be in attendance at the event.

"Renters are expected to use reasonable restraint to preserve the structure and historical aura of the site. There will be no altering of any aspect of the house or grounds. This includes the following cautions: No altering of decoration, furniture, curtains, rugs, fixtures, or plants. No use of tape, nails, tacks or other materials in or on the house; No smoking in the house; No dancing in the house or use of lighted candles; No dragging objects or furniture across the floors; No amplified music; No animals in the Facility. . . ."

## Scene four: a setting for television

The city management and the city council overruled nearly all of these guidelines when a national television network asked to temporarily remake the house into an ultramodern apartment setting for a filming. Likewise, the museum staff was told to waive the rental fee of $100 per hour, in spite of the unanimous vote of the museum board to charge the network the use policy fee.

Museum volunteers and staff responded by setting up a schedule to assure coverage at the house during the week of transformation, filming, and cleanup. Furniture was stuck with mover's labels and taken to storage, television props were installed to simulate an elevator and two false walls. During production week, the film crew blew up three ceramic lamps and a computer screen and yanked down curtains as part of the rehearsals and final performances. Afterward, the television company paid for a maid service to clean and a floor service to wax the hardwood floors. Then staff members assessed the damage to the structure.

They found scrapes, gouges, chips, and numerous pocks in the woodwork, painted walls, and floor. Two hinges were pulled from their door frames, one resulting in a twelve inch crack in the door frame. Four of the five curtains had tears in them. All sunlight had been blocked from the windows with cardboard stapled to the window frames inside and outside.

## Cut: retake or print?

The morale of staff and volunteers, including members of the museum board, plummeted. Some active and supportive volunteers were embarrassed since they had followed the use policy to the letter for programs they were involved in and had joined staff in discouraging inappropriate use of the house. Some of them spoke privately to city council members and asked that the council clarify what it wanted the house to be, a general, all-purpose rental facility or a specialized historic property for interpretation, education, and preservation. These board members queried the reason for their very existence if their judgments were subject to being overruled.

Herein lies the essence of the situation. We were all assuming that the community shared our values regarding the saving, restoration, and use of the Baldwin House. Every step from acquisition, approval of National Register status, acceptance of the use policy, and funding improvements indicated that. We learned that our values were not shared. We also learned that there was a fundamental difference between possessing the values and having the power to see that these values triumph or fail.

In this case, we had a retake. What was developing into a classical production was recast into a midday sitcom. The city council and top management favored more of the recreational facility approach and decidedly rejected those behaviors and values associated with the preservation and interpretation of history and culture.

Why, we ask? First, it is important to remember that this particular scenario is not unique. It reoccurs across our country with some frequency, and we must identify the reasons.

The values of preservation and judicious use of museum collections, historic structures, and sites prevail where a constituency with sufficient power champions the cause. Whether it comes from Native Americans, popular political leaders, or active historical societies, this support is essential. Most of us deal with locally based resources, and a sufficiently active local constituency frequently determines whether or not the community adheres to the values of preservation. Museum staff render hired or volunteer help. They can influence but cannot by themselves engender the values. National associations, accreditation bodies, and granting agencies make their voices heard. But it is local people who decide what becomes of the historic resources in their community.

Where preservation values are narrowly shared, the community may come to look on historic houses or sites as places for recreation or sources for private perquisites. Civic club leaders want to use the museum collection of quilts as backdrop for a stage at the centennial jamboree, to turn the Victorian house into a haunted Halloween setting, or to rent it for making movies. There's the college president or the mayor demanding that art work from "their" museum hang in their homes. Declaring that "service to the citizens" means

*continued on page 25*

A A S L H

Technical

# Leaflet

American Association for State and Local History

Technical Information Service

# Financial Management for the Local Historical Society

**By Michael D. Clevenger**

*Editor's note: This AASLH Technical Leaflet was originally published by the Ohio Historical Society's Local History Office as* Local History Notebook, *Volume 2, Number 3, July-August, 1986. The AASLH thanks the Ohio Historical Society for permission to reprint and distribute this publication.*

Suddenly you have found yourself elected treasurer of your local historical society. The organization has grown from ten members to over one hundred members. The first fundraiser you held netted $50. Now continuing projects, dues, and donations are well over $5,000. The board of directors has turned to you as treasurer to develop a formal plan to organize the society's financial records and finances. Where do you begin?

The question of "where do I begin?" can be answered by learning some basic financial management tools that can be applied to the small volunteer historical society. Financial responsibilities, basic recordkeeping, internal control, and preparation of budgets and financial statements will be discussed.

It is important to remember that no organization is too small for a formal financial plan. If you develop a plan when your society is small, the basic principles can be expanded as your financial success grows.

*Michael D. Clevenger, CPA, is a partner in the public accounting firm of Clevenger-Loofbourrow and Associates, Inc., Columbus, Ohio. A past president of two nonprofit organizations, Mr. Clevenger is a past treasurer and a board member of the Worthington Historical Society, in which capacity he has served since 1981. In his profession, he has dealt extensively with nonprofit organizations and has participated in and helped to develop materials in seminars relating to nonprofit organizations.*

## General Financial Responsibilities

In a small organization almost all of the financial responsibilities are delegated to the treasurer. The treasurer, like everyone else, is a volunteer with limited time to spend on the organization's activities. However, the treasurer is usually charged with the following duties:

1. Keep the financial records of the organization.
2. Prepare the budgets and financial statements.
3. Safeguard and manage the financial assets.
4. Anticipate financial problems.
5. Comply with the necessary federal and state reporting requirements.

This is sometimes a heavy load to handle, and the treasurer may want to delegate some parts of the responsibilities. Some delegation is desirable, and will be discussed later.

## Nonprofit Versus Commercial Enterprise

The treasurer must understand what a nonprofit organization is and the importance of financial stewardship since the principal difference between a nonprofit and a commercial profit-making organization involves the stewardship function.

Financial stewardship is the administration of funds for the benefit of another. A nonprofit organization's purpose is to carry out programs that meet the needs of the community it serves. Therefore, the emphasis is on accountability of the funds collected and disbursed. A profit-making enterprise, although it must be concerned with accountability, has, as its primary goal, to return a profit to the owners. The

YOUR HISTORICAL SOCIETY
CASH RECEIPTS JOURNAL
1986

| | Initials | Date |
|---|---|---|
| Prepared By | | |
| Approved By | | |

| | Date | Source | Total Deposit (1) | Dues (2) | Donations (3) | Admissions (4) | Project A (5) | Project B (6) | Project C (7) | Other (8) |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 1/9 | Dues Collected | 100 00 | 100 00 | | | | | | |
| 2 | 1/11 | Donation | 50 00 | | 50 00 | | | | | |
| 3 | 1/19 | Dues/Donation | 200 00 | 75 00 | 125 00 | | | | | |
| 4 | 1/22 | Sales - Craft Fair | 300 00 | | | | 300 00 | | | |
| 5 | 1/26 | Phone Refund | 6 50 | | | | | | | 6 50 |
| 6 | 1/29 | Admissions - Museum | 100 00 | | | 100 00 | | | | |
| 7 | | January Totals | 756 50 | 175 00 | 175 00 | 100 00 | 300 00 | -0- | -0- | 6 50 |
| 8 | | | | | | | | | | |

**Illustration 1—Cash Receipts Journal**

social concerns of the community must be considered, but are second to the profit motive.

The board of trustees of a nonprofit organization has a legal responsibility to manage the assets of the organization in a prudent manner. By accepting donations from the general public, the directors must practice sound financial stewardship and use the funds as the constitution and bylaws of the organization dictate.

## Basic Accounting and Recordkeeping

The financial records of the organization should be complete and accurate. Completeness requires that a record be kept of all funds received and disbursed. The records need to indicate the date, source, and purpose of all transactions. The records must be accurate so that they may be compared to outside sources such as bank statements, invoices, and other records without discrepancies.

At a minimum, the following journals or records should be kept:

1. Cash receipts journal.
2. Cash disbursements journal.
3. Record of donations, memorials, membership dues, etc.
4. Record of funds received with restrictions.

Illustrations 1 and 2 show examples of simple cash receipts and cash disbursements journals.

The cash receipts journal shows one month's activity. Note that it gives the date received, source, total received that day, and a breakdown of the various sources. At the end of the month, it should be totaled and compared with the total deposits listed on the bank statement.

The cash disbursements journal also shows a month's activity and indicates all the necessary information to identify a transaction and its purposes. As with the cash receipts, this journal should be totaled and compared with the checks listed on the bank statement. From these two journals alone, a financial statement can be prepared. In Illustration 3, a financial statement for the month of January is shown. It was prepared by listing the totals from the cash receipts and disbursement journals and the beginning and ending cash balance.

Basically then, any bookkeeping system can be described as having three steps:

1. Recording each transaction in a systematic manner when it occurs.
2. Summarizing, so that "like" transactions are grouped together.
3. Preparing financial statements.

As the size of your society grows and accumulates assets such as properties, collections, and excess cash, it will become necessary to establish a "double entry" bookkeeping system. A general ledger will be maintained to record assets and liabilities along with receipts and disbursements. Then a balance sheet can be prepared as seen in Illustration 4.

When a general ledger becomes necessary, it is advisable to obtain professional guidance for the initial setup and proper instruction for the recording of transactions.

## Preparing a Budget

Every society regardless of its size should prepare a budget. A budget is simply a statement showing the anticipated receipts and disbursements for the year. It is a financial plan of action and an important financial tool because it helps the organization determine what programs and activities are financially feasible. Preparation of a budget is a simple process. But it takes the input of all the society's key people, including committee people in charge of fund-raising activities and programs.

The budget preparation should begin by listing two prior years' receipts and expenditures, leaving a column open for the coming year's anticipated activity. See Illustration 5. A budget committee should evaluate each source of income and expense and determine a reasonable budget figure. The committee's budget should then be presented to the board of trustees for revision and final approval. After approval, a copy should be distributed to all members.

Remember that a budget is only an estimate. It must be periodically compared to actual results and adjusted if necessary.

YOUR HISTORICAL SOCIETY
CASH DISBURSEMENTS JOURNAL
1986

| | Initials | Date |
|---|---|---|
| Prepared By | | |
| Approved By | | |

| Date | Payee | Check Number | Check Amount | Rent | Phone | Project A Expenses | Project B Expenses | Project C Expenses | Supplies | Membership |
|---|---|---|---|---|---|---|---|---|---|---|
| 1/7 | Landlord - Office Rent | 101 | 100 | 100 | | | | | | |
| 1/10 | Ohio Bell - January | 102 | 25 | | 25 | | | | | |
| 1/21 | Craft Club - Dolls | 103 | 150 | | | 150 | | | | |
| 1/25 | Office Supply | 104 | 10 | | | | | | 10 | |
| 1/31 | Printing Co. - Cards | 105 | 25 | | | | | | | 25 |
| | January Totals | | 31000 | 10000 | 2500 | 15000 | -0- | -0- | 1000 | 2500 |

Illustration 2—Cash Disbursements Journal

## Internal Control

Internal control refers to the system of procedures and cross-checks that minimizes the likelihood of misappropriation of the society's assets. These procedures and controls are a must to properly carry out the financial stewardship function and protect the treasurer and board of directors from suspicion of any wrongdoing.

One of the most effective methods of internal control is the use of a budget. Budgets, when compared to actual results on a periodic basis, can reveal deviations or irregularities very quickly.

The following controls are basic for the small local historical society:

*Control over receipts*

1. Issue previously numbered receipts for all money received in cash and compare the receipts to amounts deposited in the bank.
2. Cash collections should be counted by two people.
3. A list should be made of all receipts and compared to the bank statement by someone not handling the funds.
4. All receipts should be deposited intact on a timely basis.

*Control over disbursements*

1. All disbursements should be made by check and the supporting documentation kept.
2. If the treasurer is also the bookkeeper, two signatures should be required on the checks.
3. A person other than the bookkeeper should receive the bank statements directly from the bank and reconcile them to the records.

*General control*

1. Securities or other marketable instruments should be kept in a bank safety deposit box.
2. Fixed asset records should be maintained and a periodic inventory taken.
3. Excess cash should be kept in a separate account with two signatures required to make withdrawals.
4. Fidelity insurance should be carried.

4504 - Buff
8504 - Green

| | Initials | Date |
|---|---|---|
| Prepared By | | |
| Approved By | | |

YOUR HISTORICAL SOCIETY
FINANCIAL STATEMENT
January 1986

| | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| BEGINNING CASH BALANCE - January 1, 1986 | | | 100 | |
| RECEIPTS | | | | |
| Dues | | 175 | | |
| Donations | | 175 | | |
| Admissions | | 100 | | |
| Project A - Sales | | 300 | | |
| Refund | | 7 | | |
| TOTAL | | | 757 | |
| | | | 1757 | |
| DISBURSEMENTS | | | | |
| Rent | | 100 | | |
| Phone | | 25 | | |
| Project A - Expenses | | 150 | | |
| Supplies | | 10 | | |
| Membership Expense | | 25 | | |
| TOTAL | | | (310) | |
| ENDING CASH BALANCE - JANUARY 31, 1986 | | | 1447 | |

Illustration 3—Monthly Financial Statement

## Federal and State Reporting Requirements

The Internal Revenue Code provides exemption from income tax for certain specific organizations. The most widely applicable to historical societies is Code Section 501 (c) (3). This section provides exemption for organizations organized primarily for religious, educational, charitable, or scientific purposes.

Almost all exempt organizations are required to file an annual information return with the IRS. This return, called Form 990, includes information on income, receipts, contributions, disbursements, assets, and liabilities. The return must be filed by the fifteenth day of the fifth month after the end of the fiscal year. Failure to file could result in substantial penalties if a valid reason is not shown.

There are exceptions to this reporting requirement. The exception that generally applies to small

YOUR HISTORICAL SOCIETY
Hometown, Ohio

BALANCE SHEET
March 31, 1986

| | | |
|---|---|---|
| **ASSETS** | | |
| CURRENT ASSETS | | |
| Cash on hand | $ 75.00 | |
| Cash in bank | | |
| checking | 3,794.14 | |
| savings | 24,100.67 | |
| Securities | 1,937.21 | |
| Accounts receivable | 253.25 | |
| Advances | 744.92 | |
| TOTAL CURRENT ASSETS | | $ 30,905.19 |
| REAL ESTATE & FURNISHINGS | | |
| Museum | 166,248.28 | |
| Restored home | 90,342.65 | |
| Furnishings | 61,986.20 | |
| Other property | 9,558.40 | |
| TOTAL REAL ESTATE & FURNISHINGS | | 328,135.53 |
| OTHER ASSETS | | |
| Antique show equipment | 321.67 | |
| Doll collection | 436.54 | |
| Library books | 400.72 | |
| Museum articles | 67.87 | |
| TOTAL OTHER ASSETS | | 1,226.80 |
| TOTAL ASSETS | | $ 360,267.52 |
| **LIABILITIES** | | |
| CURRENT LIABILITIES | | |
| Accounts payable | 500.00 | |
| LONG-TERM LIABILITIES | | |
| Bonds payable | 8,500.00 | |
| TOTAL LIABILITIES | | 9,000.00 |
| **FUND BALANCES** | | |
| Restoration fund | 1,000.00 | |
| Acquisition fund | 1,000.00 | |
| Operating fund | 285,392.30 | |
| Excess of receipts over disbursements | 63,875.22 | |
| TOTAL FUND BALANCES | | 351,267.52 |
| TOTAL LIABILITIES & FUND BALANCES | | 360,267.52 |

**Illustration 4—Balance Sheet**

| | Initials | Date |
|---|---|---|
| Prepared By | | |
| Approved By | | |

YOUR HISTORICAL SOCIETY
BUDGET WORKSHEET
For the year ending December 31, 1985

| | 1 | 2 Proposed 1985 | 3 Actual 1984 | 4 Actual 1983 |
|---|---|---|---|---|
| RECEIPTS | | | | |
| Dues | | | 300 | 250 |
| Admissions | | | 250 | 200 |
| Project A | | | 200 | 100 |
| Project B | | | 100 | 150 |
| Project C | | | 50 | 50 |
| Interest | | | 100 | 100 |
| TOTAL | | | 1000 | 850 |
| DISBURSEMENTS | | | | |
| Rent | | | 100 | 100 |
| Phone | | | 150 | 50 |
| Programs | | | 500 | 400 |
| Membership | | | 50 | 25 |
| Supplies | | | 10 | 10 |
| Acquisitions | | | 190 | 215 |
| Library | | | 100 | 50 |
| TOTAL | | | 1100 | 850 |
| EXCESS | | | | |

**Illustration 5—Budget Preparation**

organizations is that you need not file if your gross receipts are $25,000 or less.

State reporting requirements generally are concerned with the solicitation of funds. Organizations should contact their Attorney General or County Clerk for specific information about registration requirements prior to soliciting funds from the general public.

## SUGGESTED READING


Daughtrey, William II. *Museum Accounting Handbook.* Washington, D.C.: American Association of Museums, 1978.

Gross, Malvern J. *Financial and Accounting Guide for Nonprofit Organizations,* New York: Wiley, 1983.

Haller, Leon. *Financial Resource Management for Nonprofit Organizations.* Englewood Cliffs, New Jersey: Prentice-Hall, 1982.

Pizer, Laurence R., Technical Leaflet No. 106. *Financing Your History Organization: Setting Goals.* Nashville, Tennessee: American Association for State and Local History, 1978.



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the use of all public resources as though they are equivalent is basically a valueless, generic approach. It frees decision makers from specific accountability and responsiblity.

Then there are the economic reasons. Historic preservation costs too much. We can't have a public swimming pool and more museum storage. Why budget funds to preserve and store these things called collections when we can use them? Why can't we parade the cars or wear the old clothes in fashion shows? When economic resources become strained, or need to be reallocated, many decision makers find it easier to change their values than to buttress cultural institutions just enough to see them through. These leaders use economic arguments when the support group for preservation does not leverage its influence, or when the overriding values of a community favor expenditures in areas other than culture and the arts.

## *Retake: what part to play?*

I've identified four possible courses of action that museum professionals can take when our opera becomes a sitcom. What course each of us takes will be influenced by the stage we are in in our careers, our options for compromise, our personal lives and circumstances, and the strength with which we hold our values. No formula, no "right" response is available.

First, we can "go with the flow." We can use resources as we are requested to do. Instead of acting as the museum director, we can play the role of historic site recreation supervisor. Instead of being the curator, we can masquerade as fashion show organizer and prop designer.

Second, we can try a compromise approach whereby we maintain curatorial values while finding and developing methods and objects for general, recreational, and expendable uses.

Third, the circumstances may not lend themselves to compromise, and we museum staff and volunteers may choose to entrench and take the consequences.

Finally, we can leave the situation.

Masters' programs in museum studies, codes of ethics, accreditation programs, and professional associations have raised our levels of awareness and professionalism in the past twenty years. But there are only a few thousand of us among millions of people who know little about the esoteric aspects of our work (and it is these esoteric aspects that they most often question or decry). To continue to develop and maintain the values associated with our profession, we need to be more frank and open in our discussions of the environments we work in and in the classroom settings we contribute to. We can ill afford to continue a passive or Pollyannic approach to our work, avoiding colleagues who need our advice and assistance when questions of value arise. If we are a profession, we must address the most important facet of our work—ourselves. ✦

*Mary Ellen Conaway took the fourth course of action. She is an unemployed museum administrator.*

# WITH HERITAGE SO THREATENED

## As battlefields become house lots, America is losing the "stored humanity of place."

*By Ronald L. Fleming*

WHY IS AMERICA getting uglier every day?

The devastating story of land exploitation, and with it the incremental loss of American identity, has become, like the obituary page, a standard feature of newspaper coverage in the last several years. The newspapers this year have reported the million square foot regional shopping center proposed for land adjacent to Manassas Battlefield Military Park; the threats to inflict on Antietam Battlefield the commercial detritus of the Gettysburg commercial strip; the prospect of ranchettes embracing historic Waterford, Virginia; and the plans to develop a hundred acre tract just south of historic Deerfield, Massachusetts.

We are trampling out a vintage of greed so powerful that the country may wake up with a hangover and a feeling of not being able to recall what happened. For in a few years time we will have obliterated both the hallowed grounds that mark our historic moments and the countryside framing a townscape that should be part of everyone's scenic birthright.

Where are the preservationists? In the main, the debates of the preservation bureaucracies focus on the size of their budgets, the possible configuration of a new heritage agency, and protection of existing perogatives in the state offices. Those with access to an endowment like the land and water conservation fund have a further privilege to defend, namely freedom from the annual Congressional appropriations struggle, if not from some Congressional oversight.

What we need is nothing less than a national commitment to protect what the German poet Rainer Maria Rilke called the "stored humanity of place." What we have is a national historic preservation program that costs less than a single F-15 fighter plane and national preservation laws without the teeth to stop offensive developments or guide them elsewhere. Preservationists are simply not reaching out to strengthen the constituencies that care about the character of our land. On the battlefield issues, the Civil War Round Table (a historical society) has been more effective in fomenting Congressional resistance than the National Trust.

The state preservation officers can't even agree on the idea of special protection for National Landmarks, that highest designation on our National Register of Historic Places, because such action would explicitly define some resources as more deserving than others. Meanwhile:

- In Newport, Rhode Island, the famous Ocean Drive with its elegant manors and views across moor and rock-bound coastline is disappearing behind a phalanx of condominiums. Taking an offending property off a historic register, as the state preservation commission did recently, is a mere wrist slap.
- Rich and bucolic farmland in Chester and Lancaster Counties, Pennsylvania, and Loudon County, Virginia, is being disfigured with "ranchettes" and shopping malls. Chester County lost 23,000 acres of farmland last year, while its local conservation agency now has protection easements in less than 6,000 acres. Strip blight spreads further into the countryside. The pristine eighteenth and nineteenth century village of Waterford, a National Landmark, is threatened by a suburban housing development that would

irreversibly transform the special and unspoiled setting that the developers are exploiting.

•On the edges of the Gettysburg National Military Park, across the battlefield where Colonel Pickett charged, the Kentucky Colonel's plastic bucket of fried chicken beckons—while adjacent to the hillside promontory at Antietam, a new suburb calling itself "Battlefield Knolls" breaks the rhythm of the fields.

No amount of academic talk about the pluralism of public taste or about the sanctity of private property rights justifies the aesthetic and spiritual losses that we are inflicting on ourselves. Preservationists must find the environmental wisdom to make broader alliances and the courage to transcend institutional turf if we are to salvage the landscape that gives individual sites their larger meaning.

It is the integrity of a landscape—so beautifully expressed and preserved in Waterford, where clapboard, stone, and brick buildings incrementally added to the landscape since 1732, nestle in farmland—which is so difficult to protect under our existing land use regulations. The current zoning for Waterford, based on the standard formula of so many housing units per acre, would allow three times as many houses as now exist in this village. Unlike most towns, Waterford has its own foundation (established in 1943) which seeks to preserve its special identity. But the Historic Waterford Foundation looked across the country for examples of appropriate zoning to protect this entity and found none. Because the county, as in most rural locales, did not have sufficient staff to do all the research necessary for a good comprehensive plan for Waterford, the foundation supported the county. The foundation also commissioned a study that demonstrated the legality of downzoning, thus making it apparent for the first time to the planning commission and the Board of Supervisors that the proper zoning for preservation was not ultimately a legal issue but a political one. In October 1987, the supervisors finally passed a plan that states preservation goals for the county in general and Waterford in particular, but the plan remains merely a statement of intent. The zoning is still inadequate and will require a long process of public hearings. Meanwhile, the foundation has had to acquire another expensive property to protect the very center of the village, further straining the group's resources.

Can the state step in? Virginia's statewide acquisitions budget for both the Historic Preservation Fund and the Land and Water Conservation Fund is only $1.6 million. LeHigh Properties purchased the seventy-seven acre Huntley Farm in 1986 for $1.2 million. The developer now wants to build thirty-five houses on this property. Virginia has no moratorium period during a planning process.

What about the federal government? Under the National Historic Preservation Act of 1966, the Secretary of the Interior can purchase properties or scenic easements to protect a National Landmark. Yet, the National Park Service's recent report on Waterford as an endangered site expresses concern about setting a precedent with such action. Four other National Landmark properties, which the Park Service calls the "crown jewels" of the National Register, are also threatened.

"What Waterford is going through demonstrates clearly that the system doesn't work," says Constance Chamberlain, former executive director of the Historic Waterford Foundation. She describes our national preservation program as "too cumbersome, too precarious, too expensive, requiring too great a level of sophistication, and available to too few."

One solution to these problems might be the creation and exercise of federal permitting powers, like those of the Countryside Commission in Great Britain, which provide immediate protection for outstanding areas. These powers could be lodged in a national preservation agency that has the independence, the separately endowed resources (and so not dependent on an annual appropriation from Congress), and both the stature and the muscle to protect our national patrimony.

Even now our Civil War battlefields are being reduced to house lots under the current system, which has no strategic overview. Every site in the Washington-to-Richmond corridor is under seige. Chantilly, a two-hundred acre site in Fairfax County, Virginia, was obliterated last year after the county zoned the area commercial. Two acres remain for voluntary organizations to fight for.

A recently organized coalition at Antietam in Washington County, Maryland, where the single bloodiest engagement in American history was fought, encouraged both the governor and the county supervisors to endorse protection of a ten thousand acre buffer zone around the two thousand protected acres of battlefield park. This is the most unspoiled battlefield site in the eastern part of the nation. Will the National Park Service's viewshed study assessing visual impacts from the protected acres come in time? Developers are now suing to put a shopping center in front of the Grove House, celebrated in the photographs showing President Lincoln meeting General George McClellan after the battle. The farm opposite the park entry and information center is for sale. Local zoning allows a house on every three acres, even on land classified as agricultural.

Observers point out that a large segment of the community supports the objectives of the Park Service in preserving the character of this area, but for totally different reasons. The local people are in the main conservative and don't like change. The greed remains very selective. Most farmers sell their land at farm prices, and the developer makes the killing.

A more comprehensive land use proposal, advanced by a study committee for the southern half of Washington

County, would restructure county agricultural zoning so that buildings relate to an existing farm landscape, thus reducing the growth pressure on the more fragile sections around the battlefield. Denis Frye, park ranger and president of the Save Historic Antietam Foundation, calls the battlefield setting "special, because it hasn't been ravaged by commercialism like Gettysburg. When you walk over the Antietam battlefield, you don't smell grease in the air. When you experience the American tragedy of the Civil War, your senses are not interrupted by souvenir trinket shops and countless billboards, as they are at Gettysburg."

*Grassmere, which stood on this site near Franklin, Tennessee for 151 years, was dismembered in 1987 and removed. The Recorp Corporation has announced plans to shave the hill top for use as fill dirt.* The Heritage Foundation / Anne B. Owen

How do we expand the sense of "hallowed ground" to conserve the rural edges of the exploding American metropolis without comprehensive federal action? The answer is: we can't. So here are some things we must do now, before our identity is lost for future generations.

•**Protect critical environmental areas.** The seventeen hundred National Landmark sites and districts, and their immediate environs, must not be left to the vagaries and opportunism of local zoning. Some European countries don't allow a single structure to be added if it despoils a special landscape. Federal grants can be used to encourage local conservation efforts, but, in those cases where federal greed is the culprit, visual standards then should be enforced by the Secretary of the Interior who is authorized to seek Congressional appropriations under the 1966 act. The village of Waterford, Virginia, deserves such action now; the Secretary of the Interior should step in, and the nation's only federally subsidized preservation organization, the National Trust for Historic Preservation, should become a forceful advocate for policy change rather than a cautious convenor of forums and preparer of "growth studies."

This urgent need for more land use regulation coincides with the *First English* case recently before the Supreme Court, holding that the "taking clause" of the Fifth Amendment may require monetary compensation for even a temporary taking of property if a local land use regulation is later found to be invalid. Christopher Duerksen, an experienced land use attorney formerly with the Conservation Foundation, believes that the chilling effect of this decision on land use controls may require a Constitutional amendment exempting governments from the payment of such cash compensation. When local governments faced challenges to land use regulation based on the Sherman Antitrust Act, Congress crafted legislation exempting local government regulation from the statute. A comprehensive strategy of national land use regulation may require a similar solution.

•**Enhance existing historic areas.** We should give local property owners political and financial incentives to support protection by coordinating resources that upgrade the perceived value of historic places—the *tout ensemble.* State historical commissions tend to use up energies and funds documenting historic sites or restoring individual properties. Planting trees, burying wires, removing signs, providing interpretation, and buying green space easements to prevent development in "greenbelts" around historic towns are not usually seen as part of their mission. Aggressive interaction with other governmental agencies could remedy these conditions. For example, California's Public Utilities Commission requires that two percent of gross utility revenues be redistributed to communities that request financial assistance to put wires underground. Edgartown, Massachusetts, and Portsmouth, New Hampshire, bewigged with wires on historic streetscapes, could certainly use such help now. State preservation agencies should set priorities for utilizing public utility funds for underground wiring in historic areas.

•**Support civic design strategies.** Few cities now have design plans that envision a desired physical appearance and character thirty years hence. In San Francisco, it took a decade of aesthetic disfigurement and then the near-victory of a voter-initiated moratorium on building to shock local officials into taking a more careful look at urban design. Planning now addresses tower shapes, building materials, and even color palette. The National Trust and other preservation organizations should emulate the Civic Trust in Great Britain by giving awards for the best new buildings that respect an existing context, as well as for urban design criticism in the popular press and the most effective protection of skylines and viewsheds, as Austin, Texas, is trying to do.

*A local preservationist organization saved the house itself, but the integrity of the site, and therefore much of its history, has been destroyed.* The Heritage Foundation / Anne B. Owen

•**Control billboards and define scenic corridors.** The name of the Highway Beautification Act, which is supposed to regulate billboards, has been a misnomer since the billion-dollar billboard industry crippled it with language that requires compensation for removal of billboards along federally aided highways. This is the only environmental regulation in the United States where we have to pay the polluters to stop polluting. While the public was paying to take down 124,000 billboards, 300,000 new billboards went up. Last year the President's Commission on the American Outdoors recommended a national system of billboard-free scenic highways. Ed McMahon, director of the new National Coalition for Scenic Beauty, suggests that it could be funded by a three-hundred dollar annual tax on each of the 450,000 billboards on federally supported interstate and primary roadways. In the past two years, more than one hundred American communities have enacted tough new controls on signs and billboards. Last May, voters in Jacksonville, Florida, the largest city in a state lined with billboards, overwhelmingly endorsed a ballot referendum requiring the city to tear down every one on city streets within five years.

The vast majority of billboards have nothing to do with roadside information and only derive their value from the public investment in the road. In 1986, forty-two percent advertised liquor and tobacco products. Every community should adopt an immediate ban on all new billboards. National legislation should restore to local government the authority to remove billboards without compensation, prohibit the advertising of products that endanger public health, and ban all billboards in or near historic districts or areas eligible for historic district status. Let scenic roads and a national system of walking trails from city centers to city centers make the quality of our country accessible to the general public—thus building greater impetus to combat the remaining billboard ugliness.

•**Strengthen controls on franchise design.** A few tourist-oriented cities—New Orleans and Palm Springs, for example—have insisted on design standards encouraging franchises like McDonalds and Mobil to respect local identity in their styles, siting, and materials. But it is dramatically evident that greater statewide or regional regulatory powers are necessary. Many beautiful small towns have no planning staff and cannot protect themselves against batteries of corporate lawyers who challenge their generally weak site standards. Towns catering to tourists have the most to lose through this banal corporate homogenization, but every city or town should defend the right to enhance its own visual character.

•**Vigorously encourage environmental education.** Preservationists must focus on educating a broadening constituency rather than spending most of their energy educating themselves. A new national preservation agency should have as a top priority making every school child aware of the texture of time and place. This can be accomplished with incentive grants that encourage state preservation agencies to work with state departments of education in adding such units to the curriculum, probably at the fourth through eighth grade levels. A continuous education series should be broadcast on public television that celebrates the diversity and complexity of our national patrimony the way the British Broadcasting Corporation has celebrated selected towns over a period of years. State arts agencies can also be encouraged to give public art grants that support local community efforts to celebrate place, another kind of education that most grant writing criteria now neglect.

A new American preservation act, with the more expansive protection defined here, might be inaugurated with a consciousness-raising traveling exhibit starting in the Capitol rotunda and touring the country. Recognizing the current conditions as a crisis, and entitled "With Heritage So Threatened," it would be a poignant counterpoint to the study introducing the 1966 act, "With Heritage So Rich." The exhibit could set the momentum for action that transcends the self-congratulatory, hand-holding, widget counting, and clearinghouse functions that often characterize the existing bureaucracies.

Only with forceful advocacy and more comprehensive strategy will we achieve the larger preservation goal—giving all our citizens a feeling of orientation and through it a sense of affirmation and proprietorship. Only by grasping the richness of the past can we bring environmental planning to our lives and draw enough inspiration from it to construct a future that the next generation will deem worthy of preservation. ✦

*Ronald L. Fleming is president of The Townscape Institute, a public interest planning organization in Cambridge, Massachusetts, and vice president of Preservation Action. Parts of this article will appear in the monthly magazine,* USA Today.

# We Must Review History Museum Exhibits

*By Thomas J. Schlereth*

OVER THE PAST two decades, I and other historians in museums and the academy have called for the systematic and critical review of exhibits interpreting American history. In December 1988, as a contributing editor for the *Journal of American History*, I will become responsible for a new section in that journal that will regularly review history exhibits mounted by historical societies, museums, and sites, as well as by museums of art, science, natural history, technology, and other relevant fields.

In preparing for this task, I am seeking advice from historians who practice their craft in many contexts and formats. For example, I have sought comment and suggestions from the steering committee of the Common Agenda project and the members of its task forces. At two professional meetings this year—the Association of Living History Farms and Museums's national meeting in June and the American Association for State and Local History's annual meeting in September—colleagues will critique, in program sessions devoted to exhibit reviewing, the reviewer guidelines I outline below. I particularly value the opportunity through this column, to put my perspective before the AASLH membership in advance of the fall meeting. I welcome responses on any of the issues I raise here, either at our program session in Rochester or by mail.

I recognize that exhibit reviewing presents special problems for both editors and reviewers. Unlike "portable" historical presentations, such as monographs that can easily be mailed to a reviewer, exhibits require a visit. How to get the most qualified reviewer to an exhibit remains

*Thomas J. Schlereth*

problematic. Most professional journals have no travel funds to dispatch a reviewer to a distant museum or site. It has been suggested that the National Endowment for the Humanities might offer grants to professional journals that would enable them to provide a travel stipend to those whom they commission to do reviews. The grants might apply, for example, to exhibits supported with NEH funding. Fortunately, the Common Agenda's interdisciplinary task force has set as one of its long-term goals "to address the issue of funds to ease the financial burden of traveling to review exhibits."

Many history museum exhibits tend to be ephemeral. Their limited public life span necessitates that reviewers evaluate them during relatively brief periods. For temporary exhibits, this means that a reviewer may have only a few months to see a show before it is dismantled or moved elsewhere.

Increasingly detailed, well-researched catalogs accompany many scholarly museum exhibits. They now represent an important, albeit neglected, form of scholarly historical writing. Exhibit catalogs also serve as a document of record, but one is faced with the best way of reviewing them. Following the judgment of the reviewer and the editor, I propose to evaluate major exhibit catalogs and books either within the exhibit review or in the journal's book review section.

Major historical exhibits are usually collaborative endeavors, involving the work of exhibit committees, curatorial departments, designers, and consultants. It is thus more difficult to identify professional responsibility for the strengths and weaknesses of such collective enterprises than for, say, a monograph.

Museum audiences are extremely diverse, and exhibits must be judged against the visitor clientele that the sponsoring medium had in mind. As I suggest below (see Authorship), it may be necessary for a reviewer to interview an exhibit's principal creators (for example, the chief curator, the head of the exhibit team, and others) to gather statistical information (size, number of objects, budget) as well as the intended objectives and audience for an exhibit as seen by its planners.

A final complicating factor in exhibit reviewing is how to learn when, where, and what new exhibits museums are mounting. No register, finding aid, or professional association provides, in a systematic and comprehensive fashion, information that constitutes a bibliography of past, present, and projected history museum exhibits. I am pleased, therefore, about the new feature that

HISTORY NEWS DISPATCH has begun to help address this problem.

## *Overcoming the obstacles*

Acknowledging these difficulties, how might professional evaluation of history exhibits be conducted? What should the criteria be for selecting exhibits for review? What should be the guidelines for appraising those exhibits?

To address the issue of exhibit selection first, the *Journal of American History* will review exhibits that focus on the general American history subjects identified in the journal's "Recent Scholarship" section. These topics include: agriculture and rural history, architecture and material culture, blacks, business and economics, Civil War and Reconstruction, colonial and Revolutionary period, demography, early national period, education, environment, immigration and ethnicity, Indians, intellectual and cultural history, labor, legal and Constitutional history, mass communications, military history, music and visual arts, politics, popular culture, public history, religion, science and medicine, social history, sports and recreation, technology and industry, urban history, and women. The "Recent Scholarship" section also covers geographical areas: the East, South, Midwest, West, and Canada.

I also hope to commission review essays that will examine several exhibits that focus on a special topic, theme, or event, such as the Columbian five-hundred year anniversary or the bicentenary of the Bill of Rights. I plan to have reviews of exhibits that employ material culture evidence that challenges or revises historical interpretations based largely on documentary and statistical data. Here I have in mind an exhibit such as "New England Begins," mounted by the Museum of Fine Arts in Boston and reviewed by John Demos, in "Words and Things: A Review and Discussion of 'New England Begins' in the October 1983 issue of the *William and Mary Quarterly*. We shall also cover exhibits that demonstrate innovative methods of communicating historical knowledge and understanding through design techniques, spatial formats, artifact selection, or use of audiovisual data; exhibits that apply fresh research and a new point of view to traditional genres of history museum presentation, such as the historic house museum, national park site, or outdoor living history museum; and exhibits that tackle the problem of how the past is introduced into or related to the present.

## *Guidelines for review*

To assist reviewers in their research and writing, I have drawn up the guidelines below after consulting with other historians affiliated with museums, historical agencies, and colleges and universities. I intend to send these guidelines to each individual whom I invite to accept a review assignment.

- Citation format. Include the following information in the headnote identifying the exhibit under review: Name and location of museum (complete address); Exhibit title and type (permanent, temporary, or traveling); Contacts (chief curator, designer, and head of exhibit team); Duration, venue, accessibility (institutions, locations, dates, hours, and fees); Size (square footage, number of artifacts, budget); Publications (cost and availability of catalogs, teacher curriculum guides, brochures, books); Media (cost and availability of slide sets, videos, films, videodiscs); Related programming (lecture series, symposia, public events)
- Authorship. Who were the principal individuals involved in the exhibit's planning, conceptualization, and documentation? Were exhibit designers part of the planning or fabrication of the exhibit? Were outside consultants used? In preparing one's review, was it useful to interview the curators, designers, or consultants involved?
- Sponsorship. Who has underwritten the exhibit? The museum solely? Its ancillary organizations, such as auxiliaries or related benefactors? Local, regional, or national public agencies? Businesses or corporations? Philanthropic foundations? If under-

writing support has come from varied sources, can an approximate percentage of each be ascertained? How might the nature of the financial support influence the content and interpretation of the exhibit?

•Context and content. What were the objectives for the exhibit? To display a collection? To attract a special audience? To explore a history theme or event? To educate and instruct? Is there a stated purpose for the exhibit? What is the exhibit's subject matter? What is the exhibit's historiographical context in relation to other published studies and other exhibits on the same subject?

•Form and design. What is the visual and spatial impact of the exhibit? How does the exhibit's created environment use nonverbal, experiential factors to communicate its argument or themes? Is the design appropriate to the topic under investigation and the objects selected and displayed? Does the design overpower, compliment, or enhance the substance or content of the exhibit? How do the elements of the exhibit—artifacts, their arrangement, labels, spaces, display techniques—address the affective and cognitive domains of learning and understanding? If the exhibit design is heavily dependent upon mechanical or electronic gadgets—audiovisual media, computer technology, interactive devices—do these actually work in both a functional sense (can the visitor use them?) and in a conceptual sense (do they contribute to or detract from the history being presented?)

•Method and evidence. Is an exhibit an appropriate medium for investigating the topic or is the exhibit "a book on the wall?" What explanatory methods or models are used in the exhibit? How are issues such as motivation, causality, and change explored and documented? Is the use of material culture evidence particularly innovative or instructive? Is the artifact selection meaningful to the story being told? Does the exhibit adequately, accurately, or accessibly convey the historical research supporting it? How might that research be verified and used by other historians?

•Interpretation. What version(s) of the past does this exhibit present? What are the particular assets and liabilities of this perspective on American history? Will the exhibit inform, mislead, expand, or possibly change the general public's mind about its subject? Will the exhibit expand or challenge the professional historian's understanding of its topic?

•Research and teaching implications. What other resources—catalogue, brochure, object checklist, films, videos, gallery guide, floor plan, bibliography—accompany the exhibit? Is the exhibit comprehensible on its own, or does the visitor need these supplementary materials? What is their value for other methods of history instruction and research? What are the possibilities of the exhibit itself as a teaching environment? What is the exhibit's potential as a catylst in stimulating new scholarly research? What evidence (e.g., photographs, slides, films, reference files) will survive for future historical study?

•Audience. For whom have the exhibit planners primarily intended the exhibit? A general audience? Elementary and secondary schools? Special interest groups? Local constituencies? Historians? Collectors? How did the planners seek to engage the audience? What assumptions about the audience's present concerns did they make in presenting the parts of the exhibit they chose to emphasize? Is it possible for the reviewer to gauge audience reaction in any way? While the general public may be the usual clientele targeted by most exhibits, can the reviewer identify other groups who would find the exhibit, or certain aspects of the exhibit's design, content, resources, or artifacts, valuable to their historical concerns?

### *A distinct medium*

As exhibits review editor, I do not consider this prospectus, despite its detail, as a rigid party line. My experience in history museums and in historical reviewing suggests no single approach applies in every instance. I have no intentions of demanding that reviewers address all of the above categories in every assessment of an

exhibit.

I recognize that some historians may find these guidelines inadequate, given the complexity involved in the conceptualization, research, and design of a major museum exhibit. I also know that others will claim that the *Journal of American History* is not an appropriate forum for accomplishing what I have in mind. These critics might worry that my proposals will lead to reviews of history exhibits by individuals who lack sufficient understanding of artifactual data and its use as historical evidence. The concern here would be that a journal of academic history is the wrong place to review history exhibits because most historians have been trained primarily to use manuscript, documentary, and statistical sources and are uninformed, indifferent, or hostile to considering material culture in historical explanation. As one colleague wrote me recently, "Some in the museum field would see your proposal as a plot to undermine artifact orientation while transforming museums and their products into that which is approved by academic historians who lack a 'museum sense.'" I have no such designs. My objective will be to secure reviewers—historians who work both in museums and in the academy—who look upon the history museum exhibit as I do, namely as a distinct medium for identifying, organizing, comparing, analyzing, and communicating historical information and interpretation.

Perhaps a more important challenge that I have encountered in arguing for regular critical peer review of history exhibits is whether or not historians consider such reviews important to their individual or collective work. It has been pointed out that the major professional journals have tried to publish reviews, but their coverage has been uneven and their frequency irregular. By contrast, I would note that journals with the most consistent tradition of regular exhibit reviews, for example, *Technology and Culture,* have strong connections with academic subdisciplines in history. The lack of regular museum review sections in the major museum journals might be attributed to various reasons. "The fear of losing members or subscribers, timid curatorial reviewers, the good old boy syndrome, and the emphasis on sincerity rather than competency," writes my perceptive correspondent, "are some of the factors that conspire to make our [museum] field incapable of peer review."

I hope that the current and next generation of historians working in museums will ultimately disprove this realistic assessment of present circumstances. I recognize that what I am proposing has failed before; it could again. I am, however, encouraged by the response that I have received from the hundred or so historians to whom I sent drafts of my guidelines and from whom (including the critics) I have received helpful advice. If the mail is to be believed, the idea of peer review of history exhibits is an idea worth trying again.

I realize that I will need all the help I can get. In that spirit I conclude by reiterating my desire for additional critique and comment from the AASLH membership. I also welcome suggestions for appropriate history exhibits for the *Journal of American History* to review in the future. I would especially appreciate names and addresses of those who would like to be added to the reviewer file that I am creating. Send suggestions, in both instances, to Thomas J. Schlereth, Department of American Studies, 271 Decio Hall, University of Notre Dame, Notre Dame, Indiana 46556.

I believe, with the continued assistance of those historians who helped me formulate the above guidelines and with the others who will join us, we have the potential of making the new exhibit review section of the *Journal of American History* a lively forum wherein historians working in the various institutional contexts can engage one another's work involving some of the important public and professional dimensions of the craft. ✦

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## Forthcoming in HISTORY NEWS:

- Sherry Butcher-Younghans on volunteering in history museums
- David Crosson on collecting artifacts involved in a horrifying crime
- David Rowe on the history in "public history"
- Nick Westbrook on "We the People," the new, permanent exhibition at the Chicago Historical Society

## THE BOOKSHELF

### *A Handbook for Cultural Trustees*

MARION A. PAQUET with RORY RALSTON and DONNA CARDINAL
University of Waterloo Press, Waterloo, Ontario, 1987
75 pages. $22.95.

Distributed from the Canadian Museums Association, 280 Metcalfe Street, Suite 202, Ottawa, Ontario K2P 1R7.

*Review by Ellsworth Brown*

THE SUCCESS OR failure of trusteeship carries a major portion of state and local history's future with it, and any book or manual that contributes to a better board should be worth reading. Why, then, does *A Handbook for Cultural Trustees* represent a dilemma for the reviewer?

*Handbook* is unusual. The result of a conference to consider cultural leadership in Canada, it combines a treatise on the "Role, Responsibilities, and Functions of Boards of Trustees" with specific guidelines of appropriate roles and tasks. Produced in notebook form, it also provides evaluative surveys and checklists that may be duplicated and used by boards. Finally, it includes a tab section in which to file the products of the surveys and related board documents.

Chapter headings, called "Parts," are comprehensive and include "The Leadership Challenge;" "Role, Responsibilities, and Functions;" "Organizational Development;" and "Steps to Improving Processes." The preface correctly suggests that *Handbook* is "only a very brief introduction" to the "complex nature" of leadership. The book is equally applicable to trustees in the United States.

On the one hand, *Handbook* has some very good sections and offers recommendations with which one can almost always agree. On the other hand, the material is presented in complex layers that are difficult to absorb and apply.

Part One is first rate. The reader is quickly engaged by five brief cases of individuals interacting with boards. Through these examples, the author discusses the world of not-for-profits and what is unique about it. Public trust and a cogent review of legal responsibilities, which boards need to reconsider often, are the focus of brief discussions. Board members ought to think often about their moral responsibilities, which are also covered.

Is Part One sufficiently important to warrant the purchase of the manual? Probably not. Well-balanced and brief, its information is nonetheless already available, even to the novice board or trustee, in many articles, books, editorials, and workshops.

Part Two attempts to answer the question, "What do boards do?" Taken in small pieces, the information here is helpful and clear. The chapter as a whole is confusing. For example, the reader must sort out the difference between "functions of the board" and "responsibilities of the board." The writer declares that these last include purpose, progress, continuity, and identity, with fundraising inexplicably assigned here, too.

The section on board functions explains that a board carries out its responsibilities through policy governance (elsewhere referred to as policy management), program governance, financial and personnel management, and advocacy management. The distinctions among these terms and yet an additional layer of components for each function (e.g., "developing, establishing, implementing, and evaluating") is confusing even for an experienced professional. One can imagine the confusion that might result from the use of *Handbook* by volunteer trustees, especially new trustees in a new organization. This is an important point, because the book is intended as a hands-on training program.

The distinction between policy functions and management functions performed by staff is also unclear. The book advocates that "[trustees's] involvement should be at the *policy* level, not a direct role." But language such as "financial and personnel management" encourages one to think otherwise, and the brevity of *Handbook* precludes enough elaboration to correct this impression.

The reader can salvage Part Two by uncoupling the six groups of pointers, isolated by shaded boxes, and using them independently in a simpler framework. Part Three, "Organizational Development," can likewise be used by examining the boxes. In other respects, Part Three is too brief to permit the development of ideas. Hampered by the desire to address trustee needs for both large, mature organizations and small, new ones, the author is able to provide only a glossy survey of board types, "organizational climates," and "strengthening processes." The information is correct but not very helpful.

*Handbook* turns from theoretical platitudes to outlines for action in Part Four, "Steps to Improving Processes." Here the book becomes much more useful. A person with limited experience would be unable to execute the suggested planning processes without additional help, but a board could develop a healthy list of policies and procedures by following this chapter's guidelines.

The section on meeting preparation is by far the most helpful of the entire handbook. If an institution has difficulty achieving crisp and productive meetings, this section alone may make this book worthwhile. It provides a precise and complete, step-by-step guide to the development of a meeting, the preparation (including committee work) necessary to it, the techniques required to run it, and the methods of documenting it.

The questions at the end of each part are also intended for active board use. They are meant to be thought-provoking, but they are elementary, and their use may create an embarrassing, artificial, and counterproductive climate.

The fifth part reinforces the handbook's intention of utility, comprising no less than thirty-one pages of trustee and board surveys and survey summary sheets. Although these are keyed to the preceding chapters, there are no instructions for their use, and they are too voluminous to be used readily, even over several meetings as suggested. These forms require the reader to apply a substantial dose of imagination and intuition. Here lies the dilemma. Novices will find the text at once overly complex in its concepts and inadequately augmented by examples, detailed instructions, and guidelines. More experienced trustees will find the hands-on materials and processes too elementary to link board practices to the capabilities of a sophisticated staff.

This *Handbook* is directed at trustees. It is possible for staff to use the materials or to become directly involved in board training and development. Indeed, reference is often made to staff involvement. However, the book lacks the specific instructions and definitions of staff roles necessary to insure active staff involvement. This would have been a valuable addition.

The handbook is nicely packaged, but these shortcomings and the need for a good editor make it of limited practical use. ✦

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*Ellsworth Brown is president and director of the Chicago Historical Society.*

# FIELD REPORT

## *For the Fund Raiser: Going the Extra Mile*

### Getting an NEH Challenge Grant requires planning and vision

*By Harold C. Cannon*

*Editor's note: The National Endowment for the Humanities supports research, education, and public programs in history and other disciplines of the humanities. NEH awards this support under a number of categories. One of these is Challenge Grants.*

*The Challenge Grant category resembles all the others. The applicant must devise ways for advancing, enlarging, and improving the study of history and show how much it will cost to do those things. But this awards category has distinctive qualities, too.*

*The word "challenge" means that the recipient must raise three or four dollars for each federal dollar that the Endowment awards. The rules further require that these nonfederal funds come from either new sources of giving or increased contributions from previous donors.*

IF THE FUNDING categories of the National Endowment for the Humanities could talk, I imagine all the others would say to applicants: "You have a project in mind. This is the category that supports that kind of project." But the Challenge Grant category says: "You are an institution in the humanities business, and you need long-term or even perpetual support that enhances and improves your activities. Here is a category that helps you raise the funds necessary to insure that support and to find new sources of support."

All nonprofit institutions in history and the other humanities may apply for an NEH Challenge Grant, except elementary and secondary schools. In a recent cycle of applications, sixty-eight museums and historical organizations were among the one hundred and eighty-four applicants. The average award was $420,000.

For what kinds of activity might your museum or history agency seek a challenge grant? A complete list of possibilities would be long, but here are some common ones:

- buying equipment
- maintaining facilities
- establishing or increasing an endowment
- sponsoring a lecture series
- subsidizing a publication
- producing a radio or television

program

- constructing or renovating a building
- retiring debt
- hiring consultants
- adding personnel
- acquiring objects
- creating orientation exhibits and programs
- cataloguing collections
- carrying out conservation and preservation programs

Some recent awards illustrate the great variety of activities that NEH Challenge Grants support.

- Higgins Armory Museum in Worcester, Massachusetts, received $300,000 (plus $900,000 in matching gifts for a total of $1.2 million) to renovate the facility, creating new space for exhibitions on cultural and military history, provide for climate control, and increase access for the handicapped.
- In Homer, Arkansas, the Homer Society of Natural History had a grant of $200,000 (to complement $600,000 in matching gifts for a total of $800,000), which supported the building of more space to hold exhibitions on the history of the relationship between Arkansan people and the region's environment and other additions to the facility.
- The Rhode Island Historical Society in Providence was awarded $227,500 (matching gifts of $682,500 for a total of $910,000) to restore the John Brown House, create an endowment for operating costs relating to the humanities, and install a new heating plant and climate control system.

## *The key is planning*

Applicants are turned down for challenge grants not because they're not doing good work in the humanities that deserves long-term support but because their applications don't demonstrate how such a grant would improve this work for decades to come. NEH Challenge Grants cannot solve transitory problems or respond to occasional needs.

For example, suppose you have an old building that requires renovation and needs a system of climate control, both to preserve your collections and to make staff and visitors more comfortable. Since you plan to use the renovated building for humanities programs, you apply for a Challenge Grant to assist with your fundraising. Now ample evidence exists that the study of history flourished for centuries in dilapidated, humid, intemperate buildings. The success of your application will depend on how convincingly you argue for a significant improvement in the study of history as a direct consequence of the proposed renovation and climate control system.

Successful applications for a Challenge Grant follow from careful planning. First you must examine the humanities content of your museum or historical agency's programs, decide what you need to exhibit, display, protect, or enhance that content, and how much your undertaking will cost. Since some needs will be more demanding than others, you must decide the priorities among them.

Your institution may seek a Challenge Grant to help establish or to expand an endowment. Your application must show how the annual revenues (currently estimated at five or six percent) will support humanities activities in perpetuity. Given the fact that NEH can provide twenty to twenty-five percent of the total needed, the Endowment will want to know how much of the balance you can raise from nonfederal sources.

The Office of Challenge Grants strongly urges you to plan your proposal in collaboration with NEH staff, who can save you a lot of wasted effort by directing your work into viable channels. Staff members know what has worked in the past, they select the panelists who will judge all applications, and they contribute to the deliberations of the National Council on the Humanities, the body charged by law with the responsibility for recommending applications to the chairman of the Endowment for action. (Only the chairman can award or deny grants, but in the great majority of cases that action implements the council's recommendations.)

About two-thirds of our applicants

avail themselves of staff assistance, and they are always the most successful. Those who do not seek counsel could help their chances considerably by reading the guidelines, but most neglect to do that, too. My explanation for this strange behavior is that some see the competition as a lottery rather than as a rational process. In a lottery all you need to do to win is buy a ticket. According to this analogy, all you need to do to win a challenge grant is to submit an application. Good luck.

## *How to fail*

Besides failing to read the guidelines and neglecting staff advice in the preliminary stages, applicants fail for a variety of reasons. A letter of rejection also follows when:

•the proposed solution for the humanities problems does not represent the best use of Challenge Grant funds

•the application does not develop the plans for humanities programs in sufficient detail to allow reviewers to assess their quality

•the programs described do not include appropriately qualified humanities personnel

•funds to be raised will replace operating funds currently used for humanities programs, so that a Challenge Grant would not increase support for them

•the application confuses the humanities with the fine and performing arts or with current affairs programming

•the proposal has too little information about the substance, rigor, and standards of the humanities program for which a grant is sought

•the plan for raising matching funds fails to persuade

•in an application for a second-time award, the applicant does not make a compelling case for it based on the experience of the first.

## *How to succeed*

Applicants who win a challenge grant convince panelists and Council members that:

•the application holds out the prospect of significantly improving the study of the humanities and in a lasting way that seems commensurate with the amount of money requested

•the application fully and honestly assesses the state of the humanities in your institution and proposes reasonable solutions for the problems and difficulties you describe

•your fundraising plan is persuasive and likely to continue producing funds that will benefit the humanities beyond the grant period, and

•if you are applying for a second-time award, your first award amply fulfilled the purposes of the grant and you have fully documented the need for a second award.

When I want to simplify this explanation, I am fond of describing it as two hurdles that successful applicants must leap over. The first is to establish needs in the humanities that are clear and that the Challenge Grant, in the amount requested, can meet. The second is to devise a persuasive fundraising plan.

It simply is not good enough to say, "We want to raise funds for history, and if we have more money we will spend it on the study of history and thus guarantee its improvement." Nor is it good enough to say, "We have outstanding history programs, we have a good track record of raising money for them, and therefore we deserve a challenge grant." Most institutions applying to this office could make both those statements honestly and yet not plan carefully for enhancing the study of history. We are looking for the few who are willing to go that extra mile with us.

If you can do that, write and describe your proposed project. We will send you guidelines and application forms. Send your letter to Office of Challenge Grants, National Endowment for the Humanities, 1100 Pennsylvania Avenue, N.W., Room 429, Washington, D.C. 20506. Our telephone number is (202) 786-0361. ✦


*Harold C. Cannon is director of the Office of Challenge Grants at the National Endowment for the Humanities.*

# FIELD NOTES

## For the Archivist

Until recently, the only computerized system available to museums for retrieving information about their photographic collections was one using a video disk. A collection had to contain more than fifty thousand photographs to utilize the system.

Now, LaGuardia Community College, in Long Island City, New York, has created a computerized information retrieval system to manage a collection holding only three thousand photographs.

The college's retrieval system resulted from a year-long project to identify and organize photographs that document the administrations of Mayor Fiorello H. LaGuardia. The National Endowment for the Humanities supported the work with a $25,000 grant.

"Our system will serve as a model for other archives and museums interested in devising computer access systems for their small collections," says Richard K. Lieberman, director of the college's archives and museum. "And it will provide easy access to researchers and scholars interested in Mayor LaGuardia or New York City politics and society in the 1930s and 1940s."

With the new computerized system, the photographs can be retrieved through three different modes: people, places, and subjects. Lieberman and his staff have identified the photographs according to date, the individuals who appear, and the site.

The photographs were part of LaGuardia's private collection of personal memorabilia. There are shots of the mayor smashing slot machines, celebrating the end of Prohibition, rushing to a fire, and reading the comics over the radio during a 1945 newspaper strike.

For more information about the computer system, contact Richard K. Lieberman, Director, Archives and Museum, LaGuardia Community College, 31-10 Thomson Avenue, Long Island City, New York 11101, (718) 626-5078.

## For the Administrator

Do you need information and ideas on planning a new museum, starting a special program, or improving an existing one? Maybe you would like to know what others are doing to reach wider audiences. Is grassroots funding in your plans, or do you want to prospect for major donors?

The Museum Reference Center at the Smithsonian Institution can help you with all these things and a lot more.

Last year more than five thousand people turned to the center for research or ideas to develop programs or improve practices in their museums or related organizations. Some of them had unusual questions. A historical society wanted to find the manufacturer of a Revolutionary sword that bore no indicative markings. A member of Congress inquired about getting the Rocky Butt jail in Oregon declared a historical site. The Museum Reference Center found the answers or found knowledgeable sources elsewhere who could help.

The center now has seventy-six bibliographies on a variety of museological topics. Regular searches of online databases enable staff to update these bibliographies regularly.

Two recent releases in the bibliography series are *Children in Museums* and *The Gifted Child in Museums.* A revised bibliography on *Disaster Planning in Museums and Related Institutions* became available last year. Center staff can reproduce these and other sources.

For that assistance and information about other services it has available, contact the Museum Reference Center, Arts and Industry Building, Room 2235, Smithsonian Institution, Washington, D.C. 20560, (202) 357-3101.

## For the Local Historian

In his many years of work with local historical societies in Wisconsin, William Schereck observed staffs and volunteers struggling with a seemingly simple problem: recording and marking the objects in their collec-

tions so that these objects could always be quickly located and identified.

Schereck started the Office of Local History at the State Historical Society of Wisconsin and the Wisconsin Council for Local History during the 1960s. "I devoted my time to the study of the problems of local historical societies," he recalls. "Cataloguing was always one of the most frustrating."

Most of the societies did not own enough objects nor have the time or opportunity to apply one of the sophisticated standard systems of cataloguing that large historical museums used. What these smaller societies needed was a simplified system, Schereck concluded. So he developed one.

The accessioning number became the basis for the system. But first Schereck reduced the number of categories of objects and created a key word that anyone could remember: LAMP. LAMP stands for

Library materials (books, newspapers, periodicals, etc.)

Artifacts (museum and archaeological objects, paintings, etc.)

Manuscripts (documents and archival materials); and

Photographs and other iconographic materials.

By adding the current year to the right element in LAMP, one can record the order of objects as they enter the collection. The first book the society received in 1989 will become L89-1, the second L89-2. If the eighth, ninth, and tenth museum items are a new kind of butterchurn, an arrowhead, and a Murano glass, they become M89-8, M89-9, and M89-10.

Once assigned, the number remains the single identifying and retrieving signal attached to the item as its recording moves from the receipt and accession sheets to the shelf list, the subject cards, and the main catalog. The system can be started at any time and applied to earlier collections at the cataloguer's convenience.

Schereck provides guidance to installing LAMP and preparing accession records, catalog cards, and other components in a fifteen page booklet, "A Simplified System of Cataloging for Local Historical Societies." Schereck publishes the typewritten and photocopied booklet himself and generously offers it to the field for his duplicating and mailing cost, which is three dollars. Make your check payable to William J. Schereck, and send your order to Scherck Local History Fund, Inc., W11013 West Harmony Drive, Lodi, Wisconsin 53555.

## For the Volunteer

Last fall, the Sherman County Historical Museum, in tiny Moro, Oregon, gave its volunteers a brunch—and a questionnaire that asked them how the museum ought to be doing things differently.

Sherman County, set in Oregon's cattle and dry wheat country, has only 2,100 people. Two hundred and seventy belong to the historical society, which operates the museum.

According to Society president Sherry Kaseberg, museum volunteers "have a job description that provides interesting days—arranging for prints of photographs in the collection for visitors, handling money and the museum store, assisting with family research, dusting and cleaning, watering the shrubs and flowers, and flying the flag!

"The volunteers continue to be the stars of our show," adds Kaseberg. Some sixty volunteers came to the brunch, and two dozen completed the survey.

What did they most enjoy about volunteering? one question asked. Interested and interesting visitors received a high ranking as a positive experience. So did helping those with a special interest in the society's genealogy files.

What were the uninteresting and negative parts of the work? Volunteers responded that days with few visitors seemed long. "Questions I can't answer" was another source of frustration.

The question "What should the Board know" about the society's building, publications, and operations evoked a number of suggestions—including one calling for more substitute volunteers.

As a result of advice in the volunteer survey, the museum plans improvements in the interpretation of its huge stockpile of wheat. The volunteers relayed the great interest that the display evokes and the questions that visitors ask about it.

The survey will also lead to changes in the museum store, including more prominent signs or banners. And the returns have yielded volunteer commitments to help with this year's Country Heritage Festival, a fundraising event of the Friends of the Museum.

For more information, contact the Sherman County Historical Society and Museum, Moro, Oregon 97039.

## For the Educator

"Connecticut history is hitting the road." And the Connecticut Historical Society's educational outreach program by that name has also made a big hit.

The program embraces a variety of authoritative materials, including nine traveling exhibitions, eleven slide programs, and six curriculum booklets. These materials explore topics from Connecticut history in ways that interest a general audience. Subjects range from women's history to the culture of Woodland Indians to Yankee technological achievements to the experiences of Irish immigrants.

More than three hundred groups across Connecticut have borrowed the traveling exhibitions and slide programs, including schools, local historical societies, libraries, community and senior citizen centers, businesses and banks, YMCAs, and YWCAs. The society estimates that a quarter of a million people statewide have viewed one or the other.

Schools in the state have bought more than six hundred copies of the curriculum booklets, written and edited to assist social studies teachers at all grade levels in their presentations of topics from Connecticut history. Each booklet contains background information on a partic-

ular topic, student worksheets, and reproducible facsimiles of early original source materials, such as maps, letters, engravings, and advertising matter.

The traveling exhibitions consist of illustrated display panels, each two feet by three feet, loaned free of charge. The society charges a nominal rental fee for the slide programs, which come complete with prepared scripts. The curriculum booklets sell for five dollars or less.

The education department of the society produces all these materials. Director of Education Christine Ermenc and Education Associate Evelyn Eisenhardt develop new exhibitions, slide programs, and curriculum booklets on a periodic basis and add them to the list of selections.

For more information, contact Christine Ermenc, Education Office, Connecticut Historical Society, One Elizabeth Street, Hartford, Connecticut 06105, (203) 236-5621.

## For the Curator

The process of deaccessioning can help a local historical museum refine and increase its collection. But any time a museum disposes of an object, there can be genuine community concern.

The Chester County Historical Society in West Chester, Pennsylvania, has established a deaccessioning policy that works, according to John S. Halsted, the society's president, and Roland H. Woodward, the executive director.

Last fall, the society commissioned an auction company to include objects removed from the collections in a public sale. The objects included approximately ninety pieces of miscellaneous silver (mostly flatware), forty-four quilts, and thirteen pieces of quilts.

The Chester County Historical Society regularly reviews its collections on the basis of criteria that the board of directors has established. Objects that are removed must either have no local history or no documented history as to their manufacture; have no local important associations as to their ownership or use; must be duplicates of or highly similar to other objects in the collections; or must be in such poor condition that the society cannot exhibit them nor make them available for study.

The objects that the society sold at auction met all these criteria. The quilts, especially, duplicated others in the society's considerable collection or fell substantially below the quality and condition of the rest.

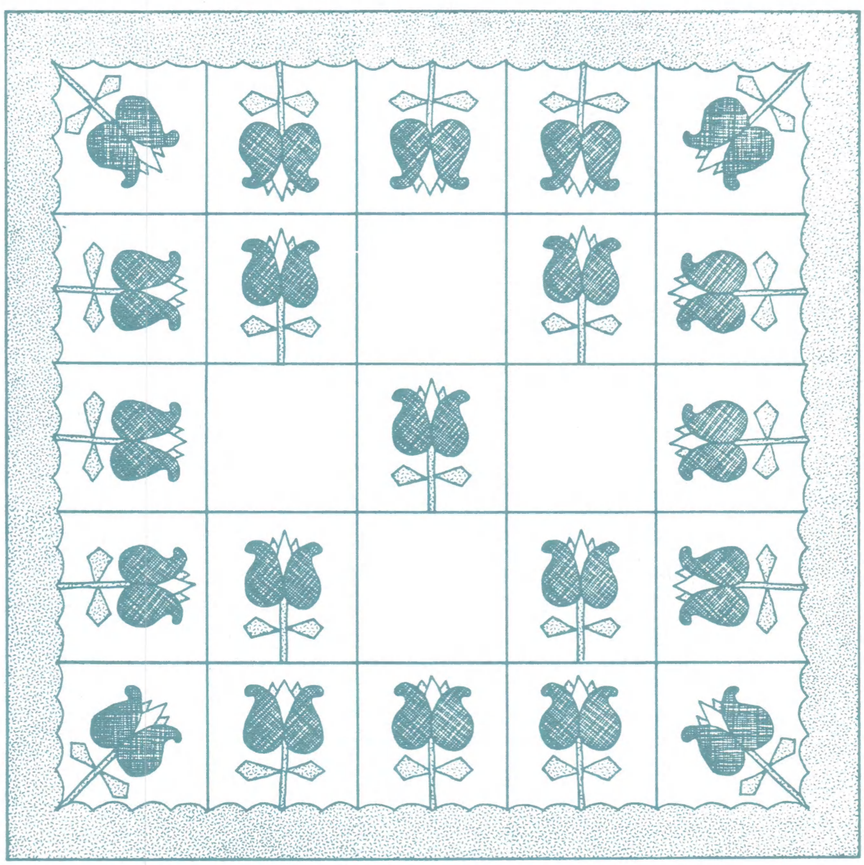
Before each object was taken to the auction block, staff and outside consultant experts reviewed it. It then went to the board's operations committee, which has oversight responsibility for the museum, library, and archives. The entire board of directors made the last review and determination. At each step in the process, support for the sale of the objects was unanimous.

Finally, prior to the sale, Halsted and Woodward sent a letter to all members, announcing the auction and explaining in detail how the objects about to be sold met the criteria for deaccessioning. The goal of the letter was to "defuse any hostility" that might arise.

According to Halsted and Woodward, this thorough deaccessioning process insures that the staff and board thoroughly review any object proposed for removal, especially in regard to any restrictions on the object. "The Chester County Historical Society does not part with any object on which the original donor has placed an expressed restriction at the time of the gift," they add.

Proceeds from the sale of deaccessioned objects go into the society's collections fund. The society uses the fund solely for acquisitions to the collections, conservation of objects, and special needs related to the collections.

For more information, contact Roland H. Woodward, Executive Director, Chester County Historical Society, 225 North High Street, West Chester, Pennsylvania 19380, (215) 692-4800.



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